

Global Education Systems

Wolfgang Hörner
Hans Döbert
Lutz R. Reuter
Botho von Kopp *Editors*

The Education Systems of Europe

Second Edition

 Springer Reference

Global Education Systems

This series of handbooks presents analytical descriptions of the education systems around the world. It provides easily accessible, practical, yet scholarly, sources of information about the structural features of the respective education systems, including the history of the education system, the socio-cultural context of the education system and the organizational context.

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Wolfgang Hörner • Hans Döbert
Lutz R. Reuter • Botho von Kopp
Editors

The Education Systems of Europe

Second Edition

With 47 Figures and 6 Tables

 Springer Reference

Editors

Wolfgang Hörner
University of Leipzig
Leipzig, Germany

Hans Döbert
University of Erfurt
Erfurt, Germany

Lutz R. Reuter
Helmut Schmidt University
Hamburg, Germany

Botho von Kopp
German Institute for Pedagogical Research
Frankfurt/M., Germany

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	Neville Harris and Stephen Gorard	

Editors

Wolfgang Hörner Professor of Comparative Education, University of Leipzig, Leipzig, Germany

Research Profile: Methodology of Comparative Education; Analysis of Educational Systems; Education in Central and Eastern European Countries; School and Work

Hans Döbert Professor, University of Erfurt, Erfurt, Germany

Research Profile: Empirical and Comparative Educational Research; Education and Monitoring; Research on Schools and Teachers

Lutz R. Reuter Professor of Educational Policy Research, Helmut Schmidt University, Hamburg, Germany

Visiting Professorships: Northwestern University, Chicago, USA

Visiting Professorships: University of Stellenbosch, Stellenbosch, South Africa

Visiting Professorships: University of Maputo, Maputo, Mocambique

Visiting Professorships: Technical University of Nanjing, Nanjing, China

Research Profile: Education Systems and Comparative Education; Educational Governance and Law; Education Policy and Politics

Botho von Kopp Associated Researcher, German Institute for Pedagogical Research, Frankfurt/M., Germany

Research Profile: Comparative Education Research; Education Policy and Governance Research; Education Stratification Research

Contributors

- Rudīte Andersone** University of Latvia, Riga, Latvia
- Natia Andguladze** Research Division, MoES, Georgia
- Peter Bachmaier** University of Vienna, Wien, Austria
- Susanne Bandau** University of Omsk, Omsk, Russia
- Katarina Batarilo-Henschen** Georg-Eckert Institute for International Textbook Research, Braunschweig, Germany
- Christopher Bezzina** Faculty of Education, University of Malta, Msida, Malta
- Sara-Julia Blöchle** Bundesinstitut für Berufsbildung, Bonn, Germany
- Christiane Brusselmans-Dehairs** University of Gent, Gent, Belgium
- Emilija Černova** University of Latvia, Riga, Latvia
- Silwa Claesson** University of Gothenburg, Gothenburg, Sweden
- Marie Clarke** University College Dublin, Dublin, Ireland
- Lucien Criblez** University of Zurich, Zurich, Switzerland
- Hans Döbert** University of Erfurt, Erfurt, Germany
- Lulzim Dragidella** University of Prishtina, Prishtina, Republic of Kosovo
- Laura Dumbrăveanu** National Institute of Educational Research, Bucharest, Romania
- Ferdinand Eder** University of Linz, Linz, Austria
- Carlos Nogueira Fino** University of Madeira, Madeira, Portugal
- Davit Ganjalyan** University of Giessen, Gießen, Germany
- Saša Gavrić** Sarajevo Open Centre, Sarajevo, Bosnia and Herzegovina
- Stephen Gorard** School of Education, Durham University, Durham, UK
- Reinhard Hanneschläger** University of Applied Sciences, Wildau, Germany

-
- Neville Harris** School of Law, University of Manchester, Manchester, UK
- Emina Hebib** University of Belgrade, Belgrade, Serbia
- Wolfgang Hörner** University of Leipzig, Leipzig, Germany
- Yasemin Karakaşoğlu** University of Bremen, Bremen, Germany
- Ragnheidur Karlsdóttir** Norwegian University of Science and Technology, Trondheim, Norway
- Anastasia Kesidou** University of Thessaloniki, Thessaloniki, Greece
- Dalia Kiliuvienė** University of Klaipėda, Klaipėda, Lithuania
- Maureen Killeavy** University College Dublin, Dublin, Ireland
- Siggy Koenig** Ministère de l'Éducation Nationale et de la Formation Professionnelle, Luxembourg, Luxembourg
- Beata Kosová** Mateja Bela University, Banská Bystrica, Slovakia
- Tamás Kozma** University of Debrecen, Debrecen, Hungary
- Volker Lenhart** University of Heidelberg, Heidelberg, Germany
- Eric Lepisto** International Development Consultant, New York, NY, USA
- Slavica Maksić** Institute for Educational Research, Belgrade, Serbia
- Stephan Malerius** Konrad-Adenauer-Stiftung, Düsseldorf, Germany
- Guillaume Many** University of Leipzig, Leipzig, Germany
- María Jesús Martínez Usarralde** University of Valencia, Valencia, Spain
- Matti Meri** University of Helsinki, Helsinki, Finland
- Iva Mindadze** Germanist, stellvertretender Direktor des Nationalen Prüfungszentrums und Abteilungsleiter DaF des Instituts für Pädagogik an der Staatlichen Universität Tbilissi, Tbilisi, Georgia
- Jože Mlakar** Sv. Stanislava College, Ljubljana, Slovenia
- Inetta Nowosad** University of Zielona Góra, Zielona Góra, Poland
- Wolf Oschlies** Kerpen, Germany
- Marko Palekčić** University of Zagreb, Zagreb, Croatia
- Petros Pashiardis** University of Cyprus, Nicosia, Cyprus
- Štefan Porubský** Mateja Bela University, Banská Bystrica, Slovakia
- Igor Radeka** University of Zagreb, Zagreb, Croatia
- Palle Rasmussen** University of Aalborg, Aalborg, Denmark

-
- Magdolna Rébay** University of Debrecen, Debrecen, Hungary
- Priit Reiska** Tallinn University, Tallinn, Estonia
- Viive-Riina Ruus** Tallinn University, Tallinn, Estonia
- Alla Sabitowa** University of Kiew, Kyiv, Ukraine
- Gerlind Schmidt** German Institute for International Educational Research, Frankfurt, Germany
- Michael Schmidt-Neke** Landtag Schleswig-Holstein, Kiel, Germany
- Jesus Maria Sousa** University of Madeira, Madeira, Portugal
- Vera Spasenović** University of Belgrade, Belgrade, Serbia
- Wendelin Sroka** Deutsches Zentrum für Luft- und Raumfahrt, Bonn, Germany
- Ola Strandler** University of Gothenburg, Gothenburg, Sweden
- Thorarinn Stefansson** Norwegian University of Science and Technology, Trondheim, Norway
- Josef Thonhauser** University of Salzburg, Salzburg, Austria
- Yilmaz Tonbul** Ege University, Izmir, Turkey
- Andreas Tsiakiros** University of Cyprus, Nicosia, Cyprus
- Bob van de Ven** Society for Educational Administration of the Netherlands, Poeldijk, The Netherlands
- Nina Volekmar** Norwegian University of Science and Technology Trondheim, Trondheim, Norway
- Botho von Kopp** German Institute for Pedagogical Research, Frankfurt/M., Germany
- Tobias Werler** Bergen University College, Bergen, Norway
- Panos Xochellis** University of Thessaloniki, Thessaloniki, Greece
- Nenad Zekanović** Croatian Ministry of Education and Sport, Zadar, Croatia
- Marina Želudenko** University of Kiew, Kyiv, Ukraine
- Irēna Žogla** University of Latvia, Riga, Latvia

Introduction

The Second Edition

The second English edition of *The Education Systems of Europe* has been updated and contains much revised material. It follows on from the third German-language edition (*Die Bildungssysteme Europas* published by Schneider in 2010), which itself contained major revisions to the second German and first English editions.

The authors themselves have been left to decide whether, and to what extent, their contributions should be updated and revised. They were all invited to rewrite the closing “Latest Developments” section to each contribution.

We have retained the rationale behind the first edition – namely, of providing an insight into the overall education system in each of the 50 European nations included in the work – and added information on higher education and adult education to each contribution wherever possible. Given the call for information on the governance of education systems, aspects such as governance strategies and activities, the system of quality development and assurance, and the support given to educational facilities and stakeholders have been further differentiated. Although a great deal of attention is given to schooling, it still needs to be seen in the context of the whole system of education. In pursuing this train of thought, we are not only responding to wishes expressed by many readers but also providing answers to perspectives on crucial issues such as education throughout life and lifelong learning that are much in demand. This also recognizes the fact that the former distinctive boundaries between levels of education – in particular, between the secondary, postsecondary, and tertiary sectors – are increasingly becoming opaque. Instead of institutions, today we see more learning, training, and study courses (often called modules) being offered across educational boundaries. The inclusion of the vocational sector and higher education manifests the multiple links of the various parts of the education system.

Subject Matter and Composition

This volume aims to present and analyze all European education systems and their developments from a comparative perspective, that is, based on uniform criteria and issues. Nonetheless, we are looking to provide more than a mere description of the

structures of the various education systems. This has already been achieved by international organizations such as the EU (Eurydice). It is the composition of the handbook that makes it unique, presenting a systematic, in-depth, and comprehensive overview of the education systems in Europe that is uniformly structured and coherent. This is what makes *The Education Systems of Europe* significantly different from the information available through the Web.

The special aspect of this volume lies not only in its coverage of all sovereign states in Europe but in its methodical composition. By and large, country contributions follow the same structure based not so much on formal as on contextual issues. This provides interested readers with reference points and orientation to make any possible comparisons. The largely uniform structure of the handbook also makes it possible for the reader to skim themes – from historical developments and the legal framework and structure through to current discussions on, and developments in, the education systems. In this way, the volume facilitates comparative studies. Even though the present volume makes no attempt at its own comparative summary, such analyses are possible given the information provided. These include issues relating to reform strategies or governance in Europe’s education systems, to the relationship between educational success and equality of opportunity, to the qualifications and professionalization of educational staff, or the educational provision for minorities, etc.

The concept behind this volume focuses on the link between descriptive representation and problem-oriented analysis. The individual country contributions have been structured to highlight historical developments; to describe innovations, reforms, and the context in which they occur with an eye on specific national problems; to broach issues relevant to the organization of the respective general and vocational education system in the context of ongoing discussions; and to spotlight development prospects for the country in question. Unlike the first English edition, this volume has not included statistical material presented in an appendix. The editors have left it to the authors to integrate statistical details in their own work as they see fit. Given the constraints of time and the number of authors, it would simply not have been possible to systematically gather statistical data for a defined set of categories. Instead, the authors have made reference to data-supported material regularly published by the OECD and the EU.

Structure of the Country Contributions

As mentioned above, this volume is distinguished by the largely uniform structure of the country contributions – exceptions are only to be found for the smaller European nations. Contributions have been structured in line with the following five key sections:

- History and Social Parameters of the Education System
- Fundamentals, Organization, and Governance of the Education System

- Overview of the Structure of the Education System
- Developments in the Current School System
- New Developments

In themselves, these five sections have their own problem-oriented internal structure, indicated in most country contributions.

In the first section, the authors discuss the cornerstones in the historical development of the country's education system. Their focus largely depends on the relevance of an event for understanding how and why the present-day education system functions the way it does. This is followed by a brief look at reforms in educational policy over the last 30 years with particular attention drawn to changes to the school system and the development of quality assurance measures. The section concludes with a look at the social and cultural framework surrounding the education system and its developments. This includes information of the population structure, ethnic minorities, and the proportion of a school population from migrant families, as well as reference to the social esteem of the teaching profession, the role of families in the education process, and the rural/urban differences in participation in education and in the infrastructure of schools.

The second section explores key aspects of the structure, organization, and governance of the education system. This includes details of educational policy and principles and the sociopolitical function of the school (integration versus segregation, for example). Furthermore, the section looks at the legal base of the education system, its management by different persons at different levels, responsibility for curricula and standards, funding and the distribution of the financial burden, and the financial involvement of users of the system. Against this background, it is important to note the relationship between the public and the private sector. This raises a key question discussed at some length in many countries in the light of PISA findings: How are quality development and quality assurance organized in the respective systems and especially in the respective educational facilities? The section also examines the issue of initial and in-service teaching training and the special training afforded to heads of educational facilities.

On this basis, the third section systematically describes the structures of the education system, from early childhood education in preschool facilities through to primary, secondary, and postsecondary education, higher education, and continued education. UNESCO's international classification of educational levels – the International Standard Classification of Education (ISCED) – provides a uniform framework for assigning levels of education across all countries. The individual levels explore contextual criteria such as differentiation, the weighting of subjects, the integration of the disabled, and so on.

Once the structures, details, and facts have been presented, the fourth section looks at possible problem areas. In many countries, this includes the (selective/nonselective) transition between levels but also concerns issues relating to examination systems and tests of school achievement, from instruments of quality development and quality assurance such as traditional inspections through to

large-scale assessments. The section also looks at particular school problems such as violence, dropouts, and the integration of children from migrant families.

The fifth section – New Developments – reports on current discussions in educational politics and on the development prospects relating to the issues addressed. Even for those country contributions that have not been fundamentally updated, this section describes developments since 2010.

This brief outline shows that most country contributions focus on the political fallout in the wake of PISA findings. At the core of this are issues of governance and quality development, social integration, and selection which have been challenges not only for education systems in Eastern Europe. In view of the myriad of education systems examined, it has become obvious that the structure we have sketched out needed to be modified for some countries. The distinction between primary school and the lower level of secondary education has no structural significance in countries with community or comprehensive schools – such as the Scandinavian countries. The same applies to the distinction between general and vocational education in countries that integrate these two aspects in one facility.

Understanding Europe

Education has always played a key role in Europe and has been emphasized as a concept in a manner probably not to be found in Anglo-American countries. With the formation of nation states in Europe from the eighteenth and nineteenth centuries, education has become a constitutional element of nation building. This fundamental dialectical tension between the universal and the particular was one of the important motives to create this handbook. One of the central issues of the country studies is precisely to display the relationship between universal values on the one hand and the search for national identity on the other.

A second issue is related to this. We, the editors of this handbook, took the decision to take account of all the education systems in Europe, with membership in the Council of Europe being the crucial factor. This volume therefore focuses on education in Europe. This confinement has its roots (besides pragmatic considerations) in the fact that Europe is of special interest even from a global point of view. The political transformation of postcommunist Central and East European countries and the European unification process has developed a high level of political and social dynamism resulting in a process of progressive integration of most of these countries in the European Union. Such a development appears to be unique to Europe. As the dynamics of transformation and integration have had a direct or indirect impact on the education systems of these countries, another central aim of this handbook is to share comparative observations of these transformation processes.

Generally, the leitmotiv of this volume does not only lie in the tension between the universal and the particular at a global level. This interest can also be substantiated at the level of European integration: the volume provides an opportunity to

juxtapose European commonalities and the retained national peculiarities and at least indirectly to launch a discussion using our work as a yardstick for the state of the European integration process.

Besides such a broad European perspective, the handbook may also be used on a more pragmatic level. In times of rapid economic, social, and cultural change, it is important and necessary for everyone concerned with issues of educational policy to understand the characteristics of other national education systems or to have a source where this information can be gained speedily and thoroughly. This is particularly so when international comparative studies (TIMSS, PISA, PIRLS, etc.) abound. International studies of school achievement can only provide few details on the institutional, structural, personnel, and governance contexts of participating education systems. In the light of this, the descriptions of the respective systems form the core of the country studies.

Our intention of providing a description and analysis of the education system of all European countries was particularly challenging: the wide-reaching concept of “Europe,” which clearly went beyond an EU perspective, gave rise to lively debate among the editors. According to the Council of Europe, there are currently 50 sovereign states – from Albania to the United Kingdom of Great Britain and Northern Ireland – within the boundaries of Europe. Nearly all are entirely located within the geographical borders of Europe. These include the 28 current member states of the European Union. As an EU member, Cyprus actually belongs geographically to Asia; the Republic of North Cyprus, which is not recognized internationally, was not selected for inclusion. The fact that the Council of Europe also holds a wider perspective of the continent eased our decision for a broad understanding of Europe that avoided making any exclusion. The Council of Europe includes two countries whose state territory clearly extends beyond the geographical borders of Europe – Russia and Turkey. The inclusion of Russia is justified by the fact that, as a whole, the country is clearly European, both culturally and from a geopolitical sense: the capital, Moscow, is in Europe, both geographically and culturally. Although Turkey’s capital is outside Europe’s geography, since the beginning of the twentieth century the country has been making every effort to position its political interests toward Europe.

There is a precarious situation for two de facto independent states: Kosovo, which has broken from Serbia, and Transnistria, which has torn ties with Moldova.

In three cases, we have deviated from the formal criteria of membership of the Council of Europe. Firstly, Belarus was included in the rank of countries chosen for the handbook. In terms of educational research, there is no reason not to take account of a country that, without question, is geographically part of Europe in a volume of European education systems. On the other hand, Kosovo was included – although its position in international law is still contentious and despite not being a member of the Council of Europe – because it has developed its own education system. In the case of Transnistria, however, this was not possible: there is no sound information to be found about its education system. Its special status is briefly outlined in the chapter on Moldova. We have taken account of the education system in the Faroe Islands: it is a largely self-governing state with its own language

and cultural tradition, and its education system is significantly removed from and independent of its Danish motherland. The Vatican is a special case. Formally, it is a sovereign state and maintains – however by and large outside its own territory, within the City of Rome – approximately 15 colleges and universities. In addition, it maintains or supports – directly or indirectly – educational facilities in many countries outside Europe. However, as the individual educational facilities do not represent a closed education system and as the Vatican is not a member of the Council of Europe, it has not been included for consideration in this volume.

Another similar problem concerns some federal states (Belgium, Germany, or Switzerland) where the members of the federation (Länder, cantons, etc.) are responsible for educational matters. In these cases, we have ventured to speak with a certain degree of abstraction of “national” systems of education, with important regional variations being highlighted. As far as the United Kingdom is concerned, although attention was focused on the whole state, it was the situation in England that was largely portrayed. While it was possible to present an integrated work for both federal entities in Bosnia and Herzegovina (Republika Srpska and the Bosnian-Croatian Federation), this was not possible for the divided island of Cyprus.

Finally, a word of thanks. The editors would like to express their warm thanks most of all to all the authors who have contributed to this book for their constructive collaboration.

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H. Döbert
W. Hörner
B. von Kopp
L. R. Reuter

Michael Schmidt-Neke

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M. Schmidt-Neke (✉)
Landtag Schleswig-Holstein, Kiel, Germany

1.1 History and Social Parameters of the Education System

1.1.1 Cornerstones of Historical Development

The beginnings of an Albanian school system in the sense of a system that employs the Albanian language can be traced back to national movement aimed at the awakening of a cultural identity (National Revival–Rilindja Kombëtare). In 1887, the first Albanian schools were opened, which, except for the school in Korça, only lasted for a short period of time; 4 years later, a school for girls was opened. It was not until 1908, however, that a conference in Monastir agreed on the use of a modified Roman alphabet. An Albanian nation state was established in 1912; however, it was too unstable and weak to contribute to the establishment of an education system on the basis of the Ottoman school system. In particular, the low degree of urbanization rendered compulsory education for 6- to 11-year-old boys and girls, introduced in the 1920s, obsolete; this phenomenon was – and is again at present – particularly marked in the mountainous northern areas.

Article 206 of the Royal Constitution of 1 December 1928 stated that “elementary education in state schools is compulsory and free for all Albanian citizens.” This step was anticipated by the Education Act of 27 June 1928, which aligned the structures of the Albanian education system to the Italian model. In the 1930s, the education system expanded. The integration of girls into school progressed gradually. Between 1924 and 1934, the number of girls attending primary and secondary schools rose from 4,000 to 15,000 and from 117 to 1,205 respectively. In 1937, 42 courses for illiterate women were offered in Albania: 1,400 of the 1,906 enrolled women received a certificate.

Whereas the average rate of illiteracy was recorded as 84 % in 1928, it reached 97–98 % in the mountainous districts, in which only clerics were able to read and write.

After World War II, the Communist government brought Albanian education and pedagogy into line with the Soviet conception, as also happened in Yugoslavia. The promotion of literacy – through adult education, which became compulsory in 1949 – the endorsement of socialism and the training of qualified personnel, which was urgently needed, were high on the agenda. In contrast to the Zogu regime, the Albanian Labour Party (PPSH) did not regard ‘intellectual overproduction’ as a threat to stability; this new attitude represents a significant paradigm shift.

The Educational Reform Act of 1946 prescribed 4 years of compulsory education; this was raised to 7 years in 1952, and to 8 years in 1963. Between 1945 and 1949, the number of elementary schools rose from 1,097 with 77,240 pupils to 1,883 with 150,724 pupils. The education system was organized along the following lines:

- Pre-primary education (arsim parashkollor)
- Seven years of basic school (arsimi i përgjithshëm shtatëvjeçar), consisting of 4 years of elementary school (shkolla fillore) and 3 years of lower middle school (shkolla mesme e ulët)
- Four years of grammar school (gjimnaz)

- Vocational or professional training (arsim profesional) by means of courses lasting 6–12 months, 2 years of vocational school, or 4 years of technical college (shkolla teknike)

Albania

						Grade	Age
(Doctorate or other post-graduate programs) (Master) (Bachelor) University		(Doctorate or other post-graduate programs) Academy	(Doctorate or other post-graduate programs) Academy	Professional colleges (higher education facilities with university status)		17	23
						16	22
		15	21				
		14	20				
(Master) (Bachelor) University		(Master) Vocational academy				13	19
						12	18
Upper secondary education		Secondary vocational education				11	17
		education				10	16
General secondary school		Public vocational school				9	15
						8	14
Lower middle school						7	13
						6	12
Elementary school						5	11
						4	10
						3	9
						2	8
Municipal nursery school						1	7
						6	6
						5	5
						4	4
						3	3

After Yugoslavia and the Soviet Union broke off relations, Albania, which had remained on the Soviet side, severed its numerous cultural links with Yugoslavia and immediately adopted the policies of the Stalinist USSR. As a consequence, the

vocational training sector was improved, the curricula became more practically oriented, and general and professional education converged.

In 1963 – after the split from the Eastern Bloc – a new Educational Reform Act introduced 8 years of compulsory education, followed by 4 years of general middle school. From 1968 onwards, party leadership availed itself of school children in order to promote the Albanian version of the Cultural Revolution. While the latter was opposed to both religion and the traditionalism of Albanian society, it did not, in contrast to the Chinese Cultural Revolution, challenge the monopoly of power of the PPSH. Although the Education Law of 1969 instigated structural changes, they were not as significant as the trend to politicize contents and methods. Especially the integration of school lessons, manufacturing of goods, and pre-military training greatly affected the lives of both pupils and teachers, who were called on for production work during school holidays. Teachers also played an important role in the advancement of literacy among adults.

The first special school for visually and hearing impaired children was established in 1963, and the first one for mentally challenged children was opened in 1970. While a boarding school for blind as well as deaf and mute children was founded as early as 1963, only in 1983 were special schools for mentally challenged and physically disabled children established in an amendment to the law.

Education also contributed significantly to the implementation of a standardized written language, which had not been regulated until 1972. In the 1980s, social subjects such as the Albanian language, literature, history, moral-political education, and foreign languages accounted for about 45 % of the curriculum of the 8-year school; the mathematics-scientific sector for approximately one third; and the fine arts subjects, physical education, and work of social interest for around 7 % each. The 8-year school concluded with final examinations in Albanian and mathematics. The grading system ranged from the best mark 10 to the lowest 1; a 5 was a pass.

Against the background of the high level of education envisaged for all people, the number of middle-school graduates increased sharply, especially in the 1970s, and culminated in 1990. The majority of these 35,000 school-leavers graduated from technical or vocational middle school, which gave vocational subjects priority over sciences and social studies.

In the Communist system, the education system contributed to social integration and homogenization. Both the peasantry, which was virtually debarred from upward social mobility, despite the fact that it made up the majority of the population, and the gradually emerging labour force gained access to education and positions on all social levels.

However, the offspring of ‘bad families’ was excluded – in some cases over four generations. Among these families were not only representatives of the authorities that collaborated with the enemy during World War II and of the anti-Communist combat units, but also relatives of the victims of the Communist political purges. These families were usually interned in remote and underdeveloped villages, in which the children were not offered any education beyond the 8-year school. From 1983 onwards, parents or legal guardians who did not comply with the compulsory education regulations were fined: this move arose from the fact that,

because of the deteriorating supply situation, many parents made their children work instead of sending them to school.

Teacher training was upgraded considerably with the establishment of the College of Education in Tirana in 1946. Additional colleges were founded later in Shkodra, Elbasan, and Gjirokastra, where teachers for the Greek minority were also trained. Teacher training courses were extended to 4 years in the 1980s.

It was not until 1957 that the State University Tirana (USHT) was founded; it remained the only Albanian university until the Velvet Revolution. While middle school teachers studied at the USHT, both sports and arts teachers were trained at advanced technical colleges. They were obliged to participate in extended vocational training courses offered by the Institute of Pedagogic Studies in Tirana. In line with the Soviet system, fundamental research was removed from the university in 1972 and transferred to the Academy of Sciences.

1.1.2 Important Reforms and Innovation

In Albania, the political changeover progressed chaotically. Especially around the turn of the year 1990–1991, people indiscriminately vandalized and looted state institutions, among them schools. As a consequence, teaching was temporarily suspended and could only be continued by means of international assistance. Even after law and order had been restored, the legal status of the schools was insecure, for numerous schools were erected on property which had been expropriated after the war and was now claimed by the families of the former owners. In the Education Law of 1995, the Albanian state accepted responsibility on the one hand for the well-being of teachers and pupils, and on the other for the inviolability of school buildings and land. However, this guarantee existed on paper only; in the civil war in spring 1997, many schools and other educational institutions were heavily damaged. As part of the reorganization of the school system, ideologically loaded subjects such as military education, party history, or work for the needs of society were either removed from the curricula or replaced by ‘depoliticized’ courses. Some schools had to teach without any teaching and learning materials, until new textbooks could be written and compiled again with the help of international support, including from the Soros Foundation.

Albania joined the Bologna process to unify course structures and qualifications across Europe. In 2007/2008, research was transferred to universities and research centres; the Academy of Sciences was converted to an honorary consulting facility, a decision that triggered considerable controversy.

1.1.3 Political, Economic and Cultural Framework of the Current Education System

As of 2008, Albania has a population of 3.17 million inhabitants living in an area of 28,748 km²; the average population density is 110.3 inhabitants per square kilometre.

The significant over-proportion of men has gradually shrunk since 2000 and as of 2005 men make up 49.8 % of the population. In spite of a natural growth in population of 1.3 % annually, emigration caused an actual decline in total population of approximately 3 % in the 1990s. Only 42.2 % of the population lives in urban areas.

After Kosovo, Albania has the lowest average age; despite a decreasing birth rate, about 28.6 % of the Albanian population in 2005 belonged to the 5–19 age bracket, which is relevant with regard to the international comparison of compulsory education.

Thus, the quantitative demands on the public education system are very high. Albania, however, is one of the poorest countries in Europe. In the year 2006, its annual gross domestic product (GDP) amounted to 2,303 euros, the average monthly per capita income in 2005 to 20,000 lek (roughly 150 euros). While the official unemployment rate for 2006 was quoted as 13.8 %, other methodical surveys report a noticeably higher rate, a large proportion of which is due to the black economy. Graduates from institutions of higher education account for only a small proportion of the registered unemployed, but they also have good prospects of emigrating. In 2006, 3,373 graduates, or 2.3 %, were registered as unemployed.

The proportion of minorities is controversial and censuses no longer gather such data; including “gypsies” and Aromanians minorities make up roughly 10 % of the population. The Greek minority has decreased immensely. The Albanian school system provides native language instruction for Greeks as well as the small Macedonian community living at Lake Prespa.

As was the case across the whole of Eastern Europe, the teaching profession did not live up all the propaganda (7th March as “Day of the Teacher” for example) and, considering the extra-curricular pressures, was poorly paid. Thanks to the strongly egalitarian salary politics of the time, this did not have such a material impact as today. Educational activity is a typical feminine profession. Nevertheless, there was a shortage of teachers, especially of the sciences, as the increased salaries including bonuses were still unattractive for many educated people. Trade and industry and the private school sector held out the prospect of better pay, particularly for those with foreign language abilities. The total number of teachers has declined greatly since 1990: at pre-primary and nursery schools by 37.4 %, at 9-year schools by 13.4 % and at middle schools by 26.7 %. The gender ratio has changed significantly in favour of women.

Minimum wages in general, and those in the public sector in particular, have been adjusted on a regular basis in order to compensate for monetary inflation. The salaries are set down by the government after the annual negotiations between the teachers’ trade unions and the Ministry. Working at an 8-year school, teachers with 10 years of experience earned approximately 16,000 lek (about 123 euros) in the school year 2003–2004. Furthermore, teachers received allowances if they could not work in their home town and additional bonuses between 350 and 1,400 lek, depending on their qualifications. Especially teachers with little experience cannot survive on these wages; they are dependent on additional earnings from private tuition or jobs in trade and industry. Consequently, they often fall back on reminding pupils of the examinations and urging them to take their private, paid-for lessons.

The district school board recruits teachers. Although head teachers can recommend the dismissal of unqualified and unreliable teachers, they rarely exercise this right in order to avoid conflicts with the network of informal connections which still characterizes the social structure of Albania.

Primary school teachers are not required to hold a university degree; it is sufficient for them to have graduated from a pedagogic middle school. In 2003/2004, 42 % of the teachers working at 8-year schools and 3.4 % at middle schools did not have a university degree. Some are trying to achieve second-chance qualifications, a fact manifested by the 26 % rise in recent years of kindergarten teachers with university degrees. The social diversification of the previously egalitarian Albanian society has increased the withdrawal from compulsory education of school-age children; however, culturally ambitious families have also furthered their children's educational opportunities.

According to the PISA survey, 84.1 % of 15-year-old pupils are from a middle class background of the highly qualified service industry, whereas only 5.7 % of them come from the working class of unskilled labourers. In Albania, the proportions of middle class female and male pupils amount to 92.2 % and 74.1 % respectively. Conversely, 23.2 % of the male and only 3.2 % of the female pupils come from the two working classes. This is the highest gender difference among the countries investigated in the PISA survey. Although the material wealth of a family, which is measured by access to luxury goods, is not the deciding factor for a child's performance at school, the children of numerous underprivileged families do not perform at all, for their parents do not send them to school.

1.2 Fundamentals, Organisation and Governance of the Education System

1.2.1 Current Educational Policy and Goals of the Education System

Domestically, European integration, including membership in the EU is a virtually indisputable goal of the country. However, this is being somewhat thwarted by the country's close associations with the USA. Therefore, Albania has concluded a number of bilateral and multilateral partnerships to reconstruct and reform its education system, including its participation in the Bologna process. It is also integrated in EU aid programmes such as the higher education programme TEMPUS and there are a number of bilateral and multilateral projects especially in the field of sciences (for example a network for material sciences and technology with four Albanian, a Kosovo, a Macedonian and two German universities).

Besides educational organizations such as UNESCO, the World Bank is also playing an important role. A strategy paper for 2004–2015 envisages the restructuring and decentralisation of educational administration while at the same time expanding the responsibility of schools and the greater involvement of parents.

1.2.2 Legal Foundations of the Education System

Article 57 of the constitution of 1998 gives everyone the right to education executed through compulsory schooling and free public schools; the right to attend at higher secondary school and university is contingent on aptitude. In addition, private schools are permitted. Article 59 establishes the education and qualification of children and adolescents in accordance with their abilities as a social objective of the state which, however, cannot be demanded by means of legal action. Article 20 guarantees national minorities the right to instruction in their mother tongue.

The Education Law of 21 June 1995 defines education as a national priority, which seeks to further intellectual emancipation, material progress, and individual social advancement. The law emphasizes every citizen's right to equal access to all levels of education without discrimination. Its principle include: compulsory schooling from the age of 6–16, the secular nature of state schools, the right to establish private schools, the provision of free school education, the right for national minorities to native-language instruction and curricula that include their history and culture, and the right for Albanian exiles to instruction in Albania.

School is a concern of the state. The Ministry of Education and Science has the responsibility for school inspection, setting of curricula, approval of textbooks, setting of the criteria for qualifications and for recognition of foreign qualifications, teacher education and training, and the establishment of vocational and special schools. Since 2003, organisations ranked below this include the Institute for Curricula and Standards that compiles curricula, the Centre for In-Service Training in Education, the National Centre for the Assessment and Examinations that compiles national examinations, the approval centre for textbooks, the Agency for Accreditation with its responsibilities for ensuring standards at universities and for accrediting university courses, two institutions for blind and deaf children, the education department in the 36 local authorities which are responsible for staffing and the provision of materials in schools.

Local authorities have the authority to decide on the establishment of both general schools and nursery schools, and the assignment of children to the schools.

Schools are supervised by head teachers, who are appointed by the relevant board of education. The powers of the head teachers are gradually being extended; the same holds for the authority of the individual schools in general. In theory, several advisory bodies exist, such as pedagogical councils, parents' councils at the level of both classes and schools, and school councils. The latter, if they exist at all, are usually preoccupied with raising funds rather than with advising on the contents of the curricula.

1.2.3 Governance of the Education System

The central institution of governance is the Ministry of Education and Science. The minister has one or two deputies (comparable to undersecretary of state); the head

of the administration is the general secretary of the ministry. The ministry is divided into departments, including for schools, universities, research, budgeting, inspection and internal auditing.

There are also regional education departments at prefecture level that coordinate school development plans, including investment in construction, in-service training of teachers and the inspectorate.

There are considerable differences in the efficiency of Albania's schools and fluctuations between class sizes are particularly stark. On average, 30.5 pupils are taught together in a class (Macedonia 31.5, Germany 24.1, Bulgaria 22.5). However, whereas the bottom 25 % (i.e., the smallest classes) average only 14.6 pupils, the top 25 % (i.e., the largest classes) average 44.1 children. Paradoxically, pupils learning in larger classes perform better (394 points) than those in smaller classes (308 points) as far as their literacy skills are concerned. The explanation of this phenomenon is that schools in rural and especially mountainous regions have smaller classes, but are poorly equipped in terms of qualified staff and teaching aids; hence their bad results. The classes in schools in urban areas, on the other hand, are bigger, but better equipped. Shortage of teachers is neither perceived as a grave problem, nor does it affect the pupils' performance significantly.

Disparities between rural and urban regions are manifest in literacy skills; pupils from villages and towns with less than 15,000 inhabitants reached 309 points in the PISA assessment, those from larger cities with up to 100,000 inhabitants scored 385 points, and children from even larger cities reached 390 points.

1.2.4 Financing the Education System and Its Institutions

In 2002, private households spent 2.1 % of their outgoings on education; in urban regions education accounted for 2.7 % of outgoings. Overall national budget expenditure on education has remained unchanged at 10–11 %. Around 3 % of GDP is spent on education (OECD 4.9 %, Macedonian 4.1 %, Bulgaria 3.4 %) but the government planning to increase this to 4 %.

1.2.5 Relationship Between the Public and Private Sectors in the Education System

The scope of private education has grown at all levels (from kindergarten to university) since the right to establish private schools was codified in 1995. In line with the course of comprehensive privatisation promulgated by the government, private education has also been supported. This opens up the social gap still further: private facilities are only accessible for a large proportion of the population through scholarships yet they are capable of attracting the best qualified teachers from the public sector. In 2006/2007, 4,000 children were cared for at 78 private kindergartens, over 30,000 pupils by 2,900 teachers at roughly 200 private schools.

As mentioned above, the right to establish and freely attend secular private schools was not codified until 1995. The Ministry of Education approves, controls, and revokes schools' licences. Within 3–12 months, it has to decide on applications; in the cases of religious instruction and partial instruction in a foreign language, the decision lies within the competence of the government. The subjects Albanian language, literature, history, and geography have to be taught in Albanian; the syllabi, moreover, have to comply with the national curricula set by the state. Private schools cannot claim subsidies.

The private education sector has expanded rapidly. In 2006/2007, 78 private kindergartens existed in which 3,921 children were looked after by 227 teachers. There were, furthermore, 198 private schools with a total of 30,448 pupils and 2,908 teachers. Thus, 4.9 % of Albanian pupils attended a private school (cf. Germany 4.1 %, Macedonia 0.5 %, Bulgaria 0.6 %). With regard to literacy, children learning at private institutions performed better, scoring 430 points in the PISA assessment compared to a mere 345 from those attending state schools. In exceptional circumstances, private tuition can be recognized as compliant with compulsory education regulations, provided that examinations are taken at a public school.

The government grants 1,600 middle school pupils and the same number of students from poor families, with handicaps, or children of police officers killed in the line of duty, scholarships of 5,000–5,500 lek (roughly 45 euros) and 8,000–8,500 lek (65 euros) per month to cover the costs of living.

1.3 Overview of the Structure of the Education System

The public school system comprises four levels:

- Public pre-primary school (arsimi parashkollor publik)
- Nine years of public compulsory education (arsimi i detyruar publik)
- Public middle school (arsimi i mesëm publik)
- Public special school (arsimi special publik)

In addition, state-maintained nursery schools and schools exist for the Greek and Macedonian ethnic minorities, in which native language teaching is offered at least partially.

1.3.1 Pre-School Sector (ISCED 0)

Non-compulsory pre-primary education for 3- to 6-year-olds is offered by municipal nursery schools. Except for food and drink, attendance is free. The task of these institutions is both to take care of the children and to prepare them for primary school. Until 1990, larger companies had to provide nursery schools for the children of their employees; however, most of them had to close during the privatisation and closure of the former socialist companies. In 1991, 109,000 children attended

kindergartens, in 2007 it was just 72,000 (–34.1 %), with the most significant fall taking place in rural districts. Only one-fifth of children are provided with catering. After 2007, the number of children in preschool education increased again and attained 81,865 in 2011/2012.

1.3.2 Primary Sector (ISCED 1)

The 9-year school is still the predominant school type. While the number of schools has remained relatively stable until 2003 (2003/2004: 1,721; however it decreased afterwards: 2009/2010: 1,600; 2012/2013: 1,472), a change in demographics has brought down tremendously the number of pupils (2003/2004: 491,541; 2011/2012: 403,704; 2012/2013: 390,837). Primary school education is subdivided into a 5-year junior (elementary school) and 4-year senior (lower secondary school) sections. Compulsory education can, however, be implemented in a reduced form or in combined classes of different years. Especially in the sparsely populated mountainous regions, this is the only way to comply with the comprehensive education regulations prescribed by law.

The proportion of pupils continuing their education at an advanced school reached a nadir of 55 % in 1995/1996; until 2003/2004, the figure had risen again to 67 %. Although the number of middle schools fell from 763 to 374 (–51 %) between 1991/1992 and 2003/2004, pupil numbers are again at the level of 1991/1992 despite experiencing a considerable drop in between.

Middle schools experienced the most far-reaching transformations. The reduction in their pupil numbers by 50 % is connected to the reorientation of Albanian educational policies since the state no longer couples these policies to the prospects of the job market. All adolescents who have completed their compulsory education and are not older than 16 have the right to attend upper secondary school. By attending one of various programmes offered, pupils can obtain either vocational college or university entrance qualifications. As with primary schools, middle schools can combine classes of different years. General public secondary schools comprise Years 9–12. They may offer optional subjects and compulsory additional courses. Furthermore, there are specialised institutions such as art schools.

By the time of the Communist system, 69.5 % of all secondary schools were vocational schools, 21.4 % were combined institutions, and a mere 9.1 % were secondary general schools. 67.2 % of secondary school pupils attended a vocational programme. In 2003/2004 83.7 % of pupils attended a general education school, in 2011/2012 even 87.3 %. In 2003/2004, 77.6 % of pupils who had joined the middle school 4 years previously passed their university entrance qualifications, in 2012 the corresponding quota was only 30.8 %.

Teaching at all schools is divided into two semesters with a total of 34–35 weeks' schooling per year. In the last year of the 9-year school, there are 2 weeks of examinations; at the end of the fourth year of middle school there are 4 weeks of examinations. In addition to 2 weeks' holidays at the turn of the year and 1 week at

Easter, there is a 3-month break from mid-June until mid-September. As in other southern European countries, the long break is a concession to the climate.

Pupil representatives do not have to, but can be, elected to school councils. Schools are free to choose their own uniforms. An office in the Ministry of Education is responsible for approving textbooks. This board involves many teachers on a rotation basis in its decisions to avoid the risk of corruption. At 9-year schools, parents pay 30 % of the price of the textbooks; at middle schools parents pay 50 %. An incremental table regulates payments to take account of the social conditions of families. Parents also support the procurement of school equipment with donations of cash or materials; in some places they pay for guards to watch over schools at risk. School councils are also involved in fund raising.

1.3.3 Special Needs Schools

At the request of parents, children with physical or mental disabilities are required to be integrated into regular schools and given special supervision if possible. Given the deficiencies of the Albanian school system, however, children with special needs can hardly rely on appropriate care and integration into regular classes. Those children who according to criteria set by the government cannot be integrated into regular classes are instructed in special classes and schools by specially trained teachers. Only in 1995 were these institutions legally defined as part of the public school system.

In 2002, 798 pupils were taught in 80 classes in 11 institutions by 188 teachers and 108 counsellors.

In Tirana there are two special schools for deaf and blind children; they receive a scholarship for 9 years. The challenge for blind pupils is to reach the same level as children completing the 9-year school, deaf children the level of the 5-year junior stage as well as special language skills.

1.3.4 Upper Secondary School (ISCED 3)

The transformation of the Albanian economic system was accompanied by the collapse not only of production structures, but also of the related systems of vocational training. New job profiles emerged, especially in the service industries.

General secondary schools and public vocational schools (*shkolla profesionale publike*) existed side by side. After 8 years of compulsory education, adolescents could attend a 2- to 3-year vocational programme in order to train as a skilled worker. Subsequent to this course, pupils were able to switch to a general secondary school, where they could obtain university entrance qualifications.

The training programmes for technicians and managers last 5 years, unless students have already studied for 10 years within the framework of compulsory education. Qualifications obtained enable students to continue their education at a university. In consequence, the number of students has increased greatly;

universities have become the repository of the unemployed. It was not until the enactment of the Vocational Education and Extended Training Law on 29 March 2002 that this sector was systematized; the law replaced the relevant regulations in the School Law of 1995. Both the Ministry of Education and the Ministry of Employment and Social Welfare have jurisdiction over this sector; the two Ministers jointly head the National Council for Vocational Education and Extended Training. Vocational training is funded by the state, municipalities, and industry. Since vocational schools are allowed to generate revenue by offering fees-based further training courses, they are more autonomous, both financially and administratively, than general schools; moreover, they can enter into commercial contracts. Privately operated vocational schools are subject to evaluation.

Professional schools (*shkolla profesionale*) are characterized by a more practical orientation. Courses are subdivided into two stages; the first lasts up to 3 years, the second 2 years and award university entrance qualifications after successful completion. On top of this there are technical schools (*shkollë teknike*) that cooperate with companies to provide technicians and specialists with practical training facilities. These companies are legally recognized as part of the vocational training system.

1.3.5 Tertiary Sector

The university system was reformed earlier than the primary and secondary education system; however, the law governing tertiary education, passed on 6 April 1994, was replaced by a new law as early as 1999 and again on 21 May 2007. Within the framework of the decentralization of the early 1990s, a new Polytechnic University emerged from the State University Tirana. Moreover, the five teacher training colleges were awarded university status. In 2006 the University of Durrës was founded and the Agricultural Institute in Kamza became an Agricultural University. There are, in addition, colleges for sports, the fine arts, and nursing. Finally, the armed forces and the police run academies offering courses that last at least 3 years.

Since 2002, higher education has also been open to private maintainers. In 2008, 15 private universities and academies were registered some of which were accredited. Despite scholarships and the chance to take out student loans at banks, the high tuition fees prevent most Albanians from entering these institutions.

The Higher Education Act of 2007 secured Albania's entrance to the Bologna process and implemented consecutive bachelor and master's degrees and the European Credit Transfer and Accumulation System. Besides offering bachelor and master's degrees universities also have to offer doctorate or other post-graduate (third phase) programmes. Courses may be offered by several facilities at the same time. Academies (*akademi*) may offer third-phase programmes, but are not obliged to. Vocational academies (*shkollë e lartë*) may only focus on master level programmes. Professional colleges (*kolegji profesional*) are also part of the tertiary sector and can be associated to higher education facilities with university status. Courses are accredited by the Ministry for a period of 6 years.

Universities have a commission to conduct research which has been considerably broadened as a result of the reduction in research conducted by the Academy of Sciences regulated in 2007. Tertiary education regulations also safeguard freedom of teaching and research, as well as administrative autonomy with regard to internal structures, and restrict the right of the police to enter university property. Governmental bodies evaluate and approve institutions of higher education. In the case of a negative evaluation, the government can order the closure of universities or subdivisions of them.

Rectors are selected by the senate, a collective body that also includes representatives of students and non-academic staff (15 % and 5 % respectively). Student councils are elected at national, university, and faculty level on an annual basis. Academic staff consists of teachers as well as assistants for teaching and for research. A consultative body, the University and Research Council was established in 2007 comprising representatives from government and the academic world.

From both a political and specialist standpoint, access to university study is always controversial and tainted with corruption with allegations made time and again of teachers awarding good examination marks for money. Enrolment has fluctuated a number of times between *numerus clausus* and a competition procedure based on defined quotas for all courses of studies. There are special quotas for Albanian applicants from Kosovo, Macedonia, Montenegro, the Albanian areas in southern Serbia.

Prior to 2002/2003, between 40 % and 50 % of the pupils who finished upper secondary school enrolled in an Albanian university course; by 2003/2004 the figure had risen to 16,478 first semester students or 66.3 % of upper secondary school leavers. In 1990–1991, 27,641 students were enrolled at institutions of higher education; by 2003/2004 the figure had increased by 90.3 % to 52,609. The proportion of female students rose from 51 % to 62 % within the same period of time. The number of graduates in 1990/1991 amounted to 4,647; in 2003/2004 5,977 (+28.6 %), although the number dropouts also increased steadily. In 1990/1991, the university sector employed 1,806 lecturers; in 2003/2004, academic staff consisted of 1,750 lecturers, 1,932 part-time lecturers, and 315 assistants.

1.3.6 Adult Education

Both the poor quality of education, which did not keep abreast of changes in the labour market, and the lack of opportunities for extended vocational training caused rapid transformations in this sector. Foreign consulting organizations such as the *Deutscher Volkshochschulverband* (German Association of Adult Education Programmes) became very involved in Albania; it supported, for instance, the establishment of an Adult Education Project. In the meantime, higher education facilities also have a brief to provide extended vocational training. In addition, Further Vocational Training Centres (*Qendra e Formimit Profesional, QFP*) have been established.

1.4 Developments in the Current School System

1.4.1 Transfer Between School Years

University entrance qualification examinations comprise written papers in two mandatory subjects – mathematics and Albanian – and two electives (languages, natural or social sciences). Between 2004 and 2007, the number of school leavers enrolling at university rose from 74 % to 97 %. Given the limited number of places in many faculties, many applicants had to assume that they would not be able to study their preferred subject and their preferred university. Applications are subject to a very complicated allocation procedure.

1.4.2 Quality Assurance Measures

Inspection departments have been operating at the Ministry and regional education departments since 2002. They evaluate and advise schools by observing lessons, issuing questionnaires and talking to head teachers, teaching staff and parents. Nationwide comparisons are published and the public can request to inspect results attained by individual schools. Albania participates in international educational programmes, albeit in some cases later than other countries. Only in November 2001 was the Programme for International Student Assessment (PISA) carried out in Albania, in which 175 schools with 4,980 pupils were evaluated. The results of this international comparative achievement test, organized by the OECD, were published in 2003, including the data for Albania and several other non-OECD countries. In contrast to other countries, however, the alarming results failed to trigger a public reaction.

In the ranking of reading skills, Albanian pupils reached an average of 349 points, which is in the lower regions of level 1. Thus, Albania ranks fortieth; only Peru achieved lower results (327 points). Only 71 % of all Albanian pupils possess the basic ability to infer and assess elementary information from texts; they thus have no prospects of pursuing a highly qualified and well paid career. Almost half of the pupils have only mechanical literacy skills or even none at all. Furthermore, these figures do not include the 57.3 % of 15-year-olds who no longer attend school. Only one Albanian pupil in seventy is able to comprehend and analyse complicated texts, which is one of the prerequisites for an academic course of studies. The range between the best and the weakest pupils (324 points) in Albania is almost as wide as in Germany (366), albeit on average approximately 100 points lower. Albanian pupils also fare relatively badly in mathematics and the science subjects (381 and 376 points respectively).

1.4.3 Dealing with Special Problems

The failure to maintain law and order particularly affects schools and adolescents. Schools were looted and damaged in both 1990–1991 and 1997. Even today,

schools are robbed and pupils mugged. Adolescents both consume and deal in narcotics. The most serious problem with regard to criminal offences, however, is kidnapping. Numerous young Albanian women are abducted by force or enticed by false promises into prostitution. Many parents keep their daughters away from extra-curricular activities or do not send them to school at all. This is particularly so in the mountainous areas in the north of the country. Head teachers usually react by expelling maladjusted children; this procedure, however, is as problematic as the dismissal of inept teachers. Furthermore, security personnel are employed and walls are erected around school buildings.

The omnipresence of violence in Albanian society – especially during the civil war of 1997 – as well as in numerous families traumatizes many children, who cannot cope with these experiences. In most cases, school does not offer adequate support or counselling. This everyday violence is also reflected in schools. Teachers are not permitted to use corporal punishment, but it does take place. Videos of physical or sexual violence filmed on mobile phones have given rise to controversy and discussions of whether such incidents are isolated cases or actually widespread. Despite the heavy penalties for parents or legal guardians whose children fail to attend school and for companies which employ children of school age, willingness to attend school declined greatly in the 1990s; this phenomenon affected especially secondary schools. The economic success of the new political system seems not to have been perceived as contingent on educational standards.

The PISA survey revealed the desolate state of education in Albania; the situation is even more alarming than in Macedonia. Despite school education being compulsory for children between 6 and 16 years of age, only 42.7 % of 15-year-olds still attend school. The Albanian figure is by far the lowest of the examined countries; even developing countries in South America and Asia displayed proportions of well over 50 %. A noticeable number of Albanian pupils drop out of the national school system as early as after the final year of primary school; 94 % of pupils continue their education at secondary school. This means that 6 % disappear from the national school system at the age of 10. While in some cases children and their families might have left Albania, migration does not account for a drop-out rate of 6 %.

However, since the relevant age group grew during the same period, it follows that a total of 11 % of the children did not comply with the compulsory education regulations, in spite of the threat of severe fines for their parents. Truancy is particularly pronounced among children who live in rural areas or who have migrated to the outskirts of the cities. As soon as children take up a job, they usually leave school or rarely attend classes any more. Likewise, attendance of secondary school is inadequate; the Albanian figure of 71 % contrasts sharply with the OECD average of 89 %. The proportion of female pupils is slightly higher (73 %) than that of their male classmates (70 %). In tertiary education, the proportion of women is noticeably higher (18 %) than that of men (11 %).

Numerous schools are characterized by structural environments that are unsuitable for educational purposes; heating systems, water supply, and sanitary facilities are in a desolate condition and in some cases even pose a health hazard. As a consequence of the rural exodus, classes in city schools have to accommodate fully overcrowded

classes of 40–50 pupils. Political discrimination has not played a significant role since 1991. The disintegration of Albanian society has resulted, however, in unequal opportunities with regard to both access to education and the quality of educational infrastructure and contents. The following social groups are particularly disadvantaged:

- Children of poor families
- Children living in rural regions
- Children living in the emerging outskirts of the cities
- Daughters of poor families

In 2001, the Institute of Statistics stated the illiteracy rate of all Albanians over 6 years of age as being 1.9 %, which is an unrealistically low figure. There is the actual risk that before long the illiteracy rate may return to that of the 1950s.

1.4.4 Measures to Integrate Pupils from Immigrant Families

Because Albania is not a nation with a high proportion of immigrants, it is not overly concerned with the issue of supporting children from migrant families. However, studies have revealed that 0.4 % of age groups investigated were born abroad of non-Albanian parents. The Albanian school system does not run integration programmes for these children. According to the PISA study, such children scored 282 points in tests of reading (country average: 349), mathematics 300 (country average: 381) and natural sciences 337 points (country average: 376). It should come as no surprise that the language barrier is quite high, but why differences in mathematics is much higher than in natural sciences is difficult to comprehend.

According to PISA, the 0.5 % of 15-year-olds of immigrants who do not speak Albanian at home are not at all disadvantaged: in the three performance areas they score 335 points in reading, 397 points in mathematics and 380 points in natural sciences. These pupils – mainly Greeks – are fully integrated and highly capable at school. This certainly does not apply to Roma families and other “gypsies”: only very few Roma 15-year-olds still attend school.

1.5 New Developments

Nothing of substance has been done to address the permanent problems of the Albanian education system in the last few years:

- Overcapacity at schools and universities
- Unappealing nature of the teaching profession
- Corruption and nepotism in examinations, tenders, etc.
- Poorly qualified teachers
- Strong competition from private educational facilities for qualified staff
- Inadequate performance of schools and pupils in international comparisons

- High drop-out rate from compulsory schooling
- Inadequate buildings and technical equipment

As the government under Sali Berisha (Democratic Party, PD) was re-elected in 2009 (despite opposition protests concerning alleged irregularities) and the Ministry of Education is headed by PD politician Maqerem Tafaj, no significant change of tact is expected before the new elections in June 2013.

In 2009/2010 (more recent figures are not available), 74,914 children attended public or private day care facilities. At 9-year schools, 439,995 pupils were registered, at general and vocational upper secondary schools there were 120,651 and 20,006 pupils respectively. In total there were 116,292 registered students, 20,843 of whom attended one of the 28 private higher education facilities.

Because the government is looking to encourage commonalities and collaboration particularly with Kosovo, but also with the Albanian minorities in west Macedonia, in southern Serbian and in southern Montenegro, joint teaching materials have been developed starting with reading books for basic school. Despite this, there is still considerable debate about the Albanian writing system codified in 1972. This is strongly characterised by the South Albanian dialect Tosk, while, with few exceptions, Albanians in the former Yugoslavia speak the northern dialect of Gheg.

Following prolonged discussion and hearings, the Education Act of 1995 was replaced by a new law on 18 July 2012. It aims to provide teachers, individual schools and regional educational planning with greater responsibilities, to gain further rapprochement to European standards and to re-regulate the various supervisory, advisory and coordination institutions. Structurally, vocational education was upgraded. The primary school was extended to 6 years, which is then followed by a compulsory 3 years of lower secondary school. Afterwards, pupils can attend a 3-year grammar school, vocational education facilities of various lengths or a profile school for foreign languages, sports, art, etc.

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Wendelin Sroka

The Principality of Andorra (*Principat d'Andorra*) is situated in the Pyrenees and surrounded by France and Spain. It has an area of 468 km² and a population of around 76,000 (data as of 2012) – making it one of the smallest countries in Europe. Nevertheless, due to historical and political reasons, it has a complex and pluralistic education system. Historically, the system of the coprincipality, established in 1278, with the Catholic bishop of Urgell, Spain, and the head of France as coprinces, brought about the creation of Spanish and French schools. This initially resulted in the development of two parallel school systems, both governed by the respective foreign administrations.

Catalan (*català*) is the only official language, with Spanish and – to a somewhat lesser extent – French also being widely used in the country. This linguistic diversity is the basis of a multilingual education system and, as regards schooling, of three different public school systems: the Andorran system, the Spanish system, and the French system. The Spanish and the French systems have long-standing traditions, and they are overseen by the respective authorities, i.e., the Spanish Administration and the French National Ministry of Education. In contrast, the Andorran system was only established in 1982. In 1993, the parliament of Andorra enacted the “Entitled Law on Education” (*llei qualificada d'educació*). According to this law, compulsory schooling lasts from age 6 to age 16, and free public education is guaranteed from age 4 and throughout the period of compulsory schooling. Also, parents can choose the system they prefer for the education of their children.

In 2011, the distribution of pupils in Andorra was as follows: Spanish system, 30 %; French system, 31 %; and Andorran system, 39 %. Over the years, the

W. Sroka (✉)
Deutsches Zentrum für Luft- und Raumfahrt, Bonn, Germany

proportion of pupils in the Andorran system has increased considerably, while the proportion of pupils in the Spanish system has decreased. The curricula in all systems are designed in such a way as to guarantee smooth transition of all pupils into the education systems in Spain and France.

The education system in Andorra comprises six areas, from preschool to adult and continuing education. Preschool education (*educación infantil*) is provided for children from age 3 to 6 and organized as part of the three school systems. Attendance is not compulsory, but nearly all children participate. In all systems, preschool education follows a curriculum-based approach and pays special attention to teaching a second language. Primary education covers Years 1–6 in the Spanish and Andorran systems and Years 1–5 in the French system, organized in primary schools. Lower secondary education (*educación secundaria obligatoria*) lasts 4 years, structured in two 2-year cycles. Education is provided by comprehensive and by grammar schools. The upper secondary (post-compulsory) level has 2-year programs in the Spanish and Andorran systems and 3-year programs in the French system. The systems include programs of specialized general education (*bachillerato*) and vocational education (*formación profesional*). Three Andorran providers offer a limited number of tertiary level degree courses. Finally, adult and continuing education is provided by a variety of institutions.

The Ministry of Education, Culture, Youth and Sports (*Ministeri d'Educació, Cultura, Joventut i Esports*) governs the schools of the Andorran system. To assure and improve the quality of schooling, the Ministry maintains a section responsible for inspection and evaluation (*L'àrea d'inspecció i avaluació educativa*). As regards the Spanish and French systems, the Ministry has responsibility for the construction and maintenance of the schools and for the teachers of *català* and Andorran history. In general, education of the Spanish and French systems (including curriculum, teaching staff, and salaries of teachers) is organized by Spain and France on the basis of international agreements between the principality and the respective governments. Teachers in all three systems receive initial training at universities in Spain or France, but the Andorran Ministry of Education takes care of in-service training for teaching staff of the Andorran system. The principality traditionally has had a special relationship with the Roman Catholic church. Thus, Catholic religious instruction is an elective subject in public schools. Whereas the church selects teachers for these classes, the state finances their salaries.

In the Spanish school system, either Spanish or Catalan is used as the medium of instruction. In both cases, the other language is taught, mostly starting at preschool level with a minimum of 3 h a week. School children have to choose between English or French in primary school, and, once they are enrolled in secondary school, they are obliged to take up the language not chosen at primary school as their third foreign language. After lower secondary education, pupils can choose between 2-year programs of general education and vocational education. The Spanish system encompasses, in addition to public schools, a number of congregational (Catholic) schools and a private, fee-paying school. Catalan is the language of instruction in Catholic schools. These schools are financed by the government of Andorra.

The French school system is based on a French curriculum and provides it in French, but the schools also have a multilingual profile. Thus, Catalan is taught for 3 h a week as part of preschool education (*enseignement en maternelle*) and for 4 h a week in primary education (*enseignement élémentaire*). English or Spanish is introduced in Year 7 (*sixième*) of the lower secondary school, followed by a third foreign language in Year 9 (*quatrième*). The most important provider of secondary education in the French system is the *Lycée Comte de Foix*. The school offers general and vocational education programs, ending with the French *baccalauréat*.

The Andorran school system follows a national curriculum. Its distinctive feature is that three languages (Catalan, French, and Spanish) are used as media of instruction. At preschool, services for 3–4-year-olds are offered in Catalan. This is followed by the class for 4–6-year-olds, where instruction is delivered in Catalan and in French. Primary education continues bilingual education. In primary school, as in preschool, classes are taught by two teachers, one teaching in Catalan and the other in French. Bilingual education is gradually supplemented by English (from Year 3) and Spanish (from Year 5) and continued in secondary school. At upper secondary level, general education programs lead to three types of *baccalauréat* (*batxillerat*): the *baccalauréat* in humanities and languages, the *baccalauréat* in science and technology, and the *baccalauréat* in economics and social sciences. Since 1997, the *baccalauréat* of the Andorran system is recognized in France.

The great majority of Andorran students take up their studies in Spain or France. Nevertheless there are various possibilities to study at tertiary level in the principality: the University of Andorra (*Universitat d'Andorra*), established in 1997 as a public institution and located in Sant Julià de Lòria, offers a limited number of on-campus and distance courses. The programs are provided by three departments: the University School of Nursing (*Escola Universitària d'Infermeria*), the Advanced Computer School (*Escola Superior d'Informàtica i de Gestió*), and the Centre for Virtual Learning and University Extension (*Centre d'Estudis Virtuals i Extensió Universitària*). The university offers a number of double-degree courses in collaboration with the Open University of Catalonia (*Universitat Oberta de Catalunya*). Next, the *Universitat Oberta de la Salle* with headquarters in Massana is active as an Andorran provider of distance learning. Finally, in 2012 the private *Universitat de les Valls* was founded in Andorra la Vella, so far specialized in offering master's degree courses in dentistry. Andorra joined the Bologna Process in 2003. The Act on higher education, passed by parliament (*Consell General*) in June 2008, and the decree on the recognition of foreign qualifications, issued in March 25, 2009 by the Ministry of Education, regulate the recognition of qualifications according to the Bologna Process and the Lisbon Convention.

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Susanne Bandau and Davit Ganjalyan

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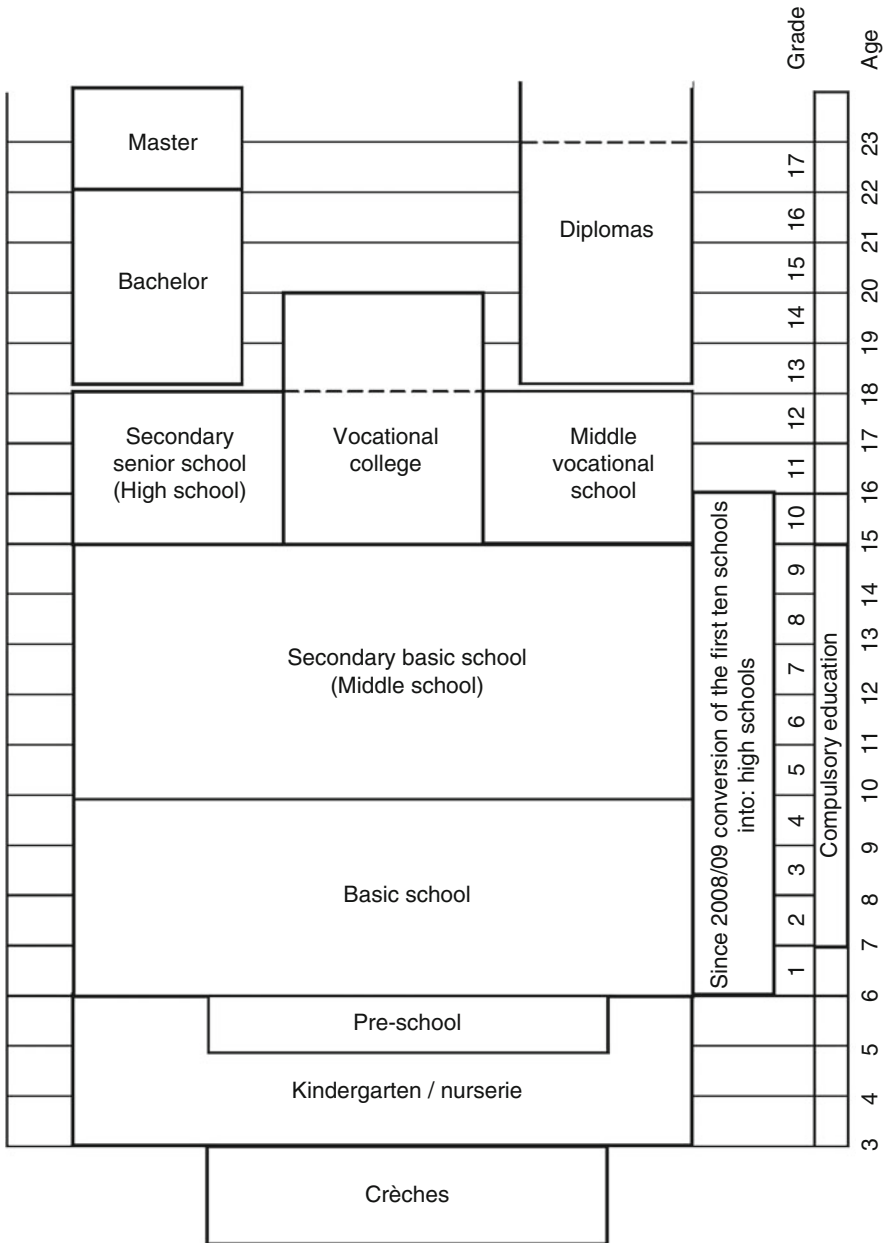
3.1 History and Social Parameters of the Education System

Education in Armenia has a very long tradition. Its origins are closely linked to the early christianization of the country at the beginning of the fourth century and the introduction of the Armenian alphabet by monk Mesrop Mashtots in 405 AD. The first school was opened in Vagharshapat where the bible, ethics, grammar, rhetoric, and dialectics were taught. Disciplines such as astronomy and geometry were added later. To help disseminate knowledge, the school trained teachers and priests who were then sent to other monasteries. There were also special schools where translators and “men of the quill,” who transcribed books, were trained.

S. Bandau (✉)
University of Omsk, Omsk, Russia

D. Ganjalyan
University of Giessen, Gießen, Germany

Armenia



These first schools drew on works of grammar, rhetoric, and philosophy translated from Greek.

In the fifth century, the scholar Davit Anhaght taught disciplines such as mathematics, geometry, astronomy, and music. In the seventh century, Anania Shirakatsi wrote the first secular academic book on mathematics, geography, and astronomy. As early as the seventh century, pupils learning from this book knew then that the Earth was round and that it orbited the sun. In the ninth century, church schools were established in towns with a large Armenian population which taught reading, writing, music, and the fundamentals of mathematics. These were the primary schools.

Until the middle of the nineteenth century, teachers were principally monks from Armenia monasteries. Later, Armenians who had studied in Europe and America returned as teachers. Education and the Armenian Church were always key elements of national identity exposed as Armenians were to significant pressures from their neighbors and the collapse of their own empires. In the nineteenth and twentieth centuries, many Armenians lived under Turkish and Russian influence. Many celebrated Armenian personalities were educated in Russia and were influential there. As in Venice and Constantinople in the past, Armenian schools were established within the Russian empire.

Acts of genocide in 1915 brought Armenian life in Turkey to an end. Still today, it is an important, if not the key, reference point in the Armenian social consciousness in public and private education. The state university of Eriwan was established during the brief period of sovereignty (1918–1920).

After 1920, a system of organized education was created along Soviet lines in Armenia – a system that was free for all and ranged from preschool through to university and adult education. However, in contrast to many other Soviet republics, the Armenian language stood strong within these structures, even if it came under pressure in schools taught in Russian, which usually offered a better, more promising education. The introduction of compulsory schooling also gave access to education to the rural population. In the capital, Yerevan, students were able to visit the state university and specialized colleges. Provided that they had command of an appropriate level of Russian, other educational offerings were also open to Armenians within the Soviet Union. For Armenia, the Soviet era triggered a period of modernization that also had an impact of the education system.

Since 21 September 1991, when 94 % of the electorate voted to leave the Soviet Union, Armenia has been trying to establish its own education system founded on its educational tradition. However, this has been hampered somewhat by the absence of a modern sovereign tradition which, with the exception of 1918–1920, has never really existed. Initially, the newly established Republic of Armenia proclaimed a set of guiding principles that had already been established in Western Europe (including the free development of personality and the secular nature of education). From an organization perspective, priority was given to decentralizing the education system and increasing the autonomy of educational facilities while at the same time securing the financing of education.

Covering an area of 26,800 km², the country has an official population of 3.5 million. It has modest reserves of raw materials that have not yet been tapped and is largely dependent of energy supplies from Russia. On top of this, Armenia is still

suffering particularly heavily from the breakup of the Soviet economic area and the earthquake of 1988. Access to Armenia and trade with direct neighbors have been made difficult as a result of the conflict in Karabakh. Borders to Turkey and Azerbaijan are closed. Politically, Armenia is maneuvering between the USA and Russia: the USA is the biggest international investor while Russia is the main supplier of energy. Russia secures the country's border and also has a military presence in Armenia. In terms of education, the country is trying to find a line to Europe – the gate to a modern world for many Armenians. A key role in this is the great Armenian diaspora. The financial support offered by Armenians abroad is the single largest source of income for the country and for most families. Attempts are also being made officially to exploit this and to include the diaspora in a variety of form in the development of the education system. Half of the population lives below the poverty line. Officially, unemployment stands at around 19 % (2011); realistically however, it is much higher. All this means that migration is a key social issue. There are however no reliable figures covering this.

The population structure is relatively homogeneous with over 90 % of the population being Armenian. Yazidi Kurds and Russian Molokans, most of whom live in rural area, are two of the larger minority groups. Migration and expulsion have brought down the proportion of minorities living in Armenia from 10 % to less than 5 %. Therefore the language of instruction in almost all Armenian schools is Armenian, and only for 1.12 % of the students, it is Russian.

Another problem that has tended to slow down the reform process has been the influx of refugees as a result of neighboring wars. Roughly 350,000 people have come to Armenia in recent years and these are far from being fully integrated into Armenia society. There is virtually no reliable statistical data on the population structure and trends, and the present scope of migration is making it additionally difficult to gather information. Consequently, it is virtually impossible to make any solid forecast and planning for the education sector.

Armenia is a country caught between the Orient and the Occident – between East and West. On the one hand, the country enjoys a very long oriental Armenian Christian tradition that always had to assert itself in its region. On the other hand, its daily culture was and still is heavily influenced by the cooperation with its neighbors. Bonds between the family and the clan are particularly strong. Early education is a matter for women, as mothers or as grandmothers. If the family can afford it, many women with small children remain at home. Education within the family is very much based on traditional roles with boys, and girls are being brought up very differently.

Not surprisingly therefore, this engenders conflict in later life when such roles cannot be fulfilled in the light of the tense economic situation prevalent in most families. Today, teaching is a typical professional for women because it is very poorly paid. Just to survive, most teachers have to work at a number of locations, take on extra hours, work as a private tutor, or work on the land to keep their heads above water. Many of them work well past retirement age. Most teachers have had practically no holiday for years, do not take part in training programs, and do not have the chance to read up on modern developments. Young graduates do not want

to work in country schools and often there is a lack of qualified staff. And teacher training leaves a lot to be desired. Many educational facilities are dominated by the old Soviet style and standards, and even this can no longer be guaranteed.

Another major problem in society and by consequence for education is the ubiquitous corruption. The collapse of the Soviet system led to the decoupling of education and demand on the labor market, if one can speak at all of a “market.” A large proportion of school leavers attend university, but there is hardly any demand for most graduates and their education. On the international labor market, Armenian certificates are barely competitive. School buildings, particularly in rural areas, are mostly in a desolate condition, and there is a shortage of the simplest furnishings and fittings and teaching materials. Most buildings are not heated which leads to a considerable absence rate in winter. Many classrooms cannot be lit artificially. Some school-aged children stay away from school because they do not have appropriate clothing (a warm coat, shoes) or because they are forced to work. Details of child labor vary, but range between 10 % and 30 % of all children.

3.2 Fundamentals, Organization, and Governance of the Education System

The first law governing general school education and tertiary education guarantees the constitutional rights of citizens to education and regulates the relationship between public and private education institutions. Each child is guaranteed the right to a general education regardless of parental income. The law on tertiary education regulates the framework for autonomy, the issuance of licenses, and the accreditation of universities. Regulations are already in force for preschool facilities, primary schools, vocational colleges, and educational facilities for new types of secondary schools and those that are in private ownership. Children are to be guaranteed free education for 8 years, from the age of 7 to 15. Armenia’s Ministry of Education and Science is largely responsible for general schooling. The ministry is accountable for implementing national education policies and for drafting legislation and proposals. The earlier central educational administrative body was abolished in 1996 with the transfer of responsibility to the eleven administrative authorities and directly to schools. In practice, however, the ministry becomes involved in many school issues and either no decisions are made at authority/school level or only very limited independent decisions. Schools have advisory councils that decide on budgets and financial settlement and appoint the head teacher.

State financing of institutions is based on pupil/student numbers. Within this guideline, the school itself (its administration and advisory council) can decide what to do with the money. Unfortunately, schools are chronically underfinanced.

Important factors in the “survival” of a school are the head teacher’s contacts at local political level to tap into additional funds to safeguard school operations. In part, schools count on the support of parents to renovate classrooms free of charge, for example. However, most of the time, they are not in a position to

provide financial funds. Where parents can afford it, there are private schools. Sometimes these are just single classes in state schools. Parents have the right to choose the school for their children or to change schools, which they often do. The provision of textbooks is critical. In 1997, the World Bank granted Armenia a loan of 8 million US dollars to provide schools with textbooks. This created a basic stock of textbooks that children from needy families could borrow free of charge.

Universities are directly under the control of the ministry, i.e., it participates (or not) in financing tertiary institutions, provides certification, issues licenses, and exercises a control function. In comparison to other nations, expenditure on education in Armenia is very low. Based on information from the UN development program, an average of 10 % of state budget is apportioned for education or approximately 2 % of gross domestic product.

Whereas in the 1980s, public spending per apprentice within the Soviet Union amounted to 500–600 US dollars, in the first budget of independent Armenia in 1992, it was less than 24 US dollars. Given the general level of poverty, parental participation has its limits; nevertheless, it is expected at schools with a “better” offer and at universities. At best, teacher salaries are at subsistence level.

3.3 Overview of the Structure of the Education System

3.3.1 Preschool Facilities

Preschool facilities can be divided into three distinct groups:

- Crèches that accept children from 6 months to 6 years of age
- Kindergartens/nurseries for children aged from 3 to 6 years
- Preschools for children directly before they start school

Attendance at a preschool facility is not obligatory. According to the official statistics, 26 % of the number of children of the relevant age attend a preschool institution, and in urban areas, the share is 33.7 %. Traditionally, crèches for children under three are not very popular in Armenia. In contrast, about two thirds of all children attend the last year of preschool, which deals in part with the material taught in the first year of school (arithmetic, alphabet).

Pre-school facilities are primarily funded by public money; nevertheless, they are worse off than school facilities. Public expenditure is estimated at 8–10 % of total outgoings for education and science. The funds are mainly used to pay for staff salaries and for bread for the children. Contributions (at least 60 % of expenses for meals) have to be paid by the parents. In the light of falling standards of living and rising unemployment, parents send increasing fewer children to a preschool facility. Moreover, migration and a low birth rate have led to a downturn in the number of children attending a preschool facility. Most preschool facilities are in a very poor condition. Some of them have had to close for a period due to the lack of funds to heat them regularly.

The poor quality of equipment makes them less attractive for parents and children. There is a distinct lack of toys, furniture, and teaching materials. Not all kindergartens offer children a chance to sleep. A further problem relates to the provision of food, which traditionally is part of the preschool culture in Armenia, but which nowadays can no longer be guaranteed. Preschool facilities are largely reliant on the collaboration of parents, but the parents themselves are largely average or low earners or even poor. Roughly half of kindergarten staff do not have corresponding qualifications. The poor remuneration and the unsatisfactory working conditions have led to many people leaving the profession in preschool facilities.

3.3.2 General School Education

Since 2008, compulsory schooling in Armenia covers 12 years. Children start today school at the age of 6 years. The twelve-year general school system comprises the following levels:

- Primary school 4 years (grades 1–4)
- Secondary basic school (middle school) 5 years (grades 5–9)
- Secondary senior school (high school) 3 years (grades 10–12)

In primary school, the focus lies mainly on developing language skills as well as on learning how to learn and work. At this early stage pupils start learning foreign languages (Russian and a western language, mainly English) and learn three writing systems, the Armenian, Cyrillic, and Latin.

The primary school is usually a feeder to a middle school. This largely retains the common school system from the Soviet Union, with middle schools and secondary senior schools (high schools) operating separately. There are also special schools where subjects or discipline groups (mathematics, natural sciences, languages) are offered in depth. In addition, there are some music, art, and sport schools. Primary and middle schools aim:

- To convey basic knowledge of the natural environment, technology, production, and methods of independent learning
- To acquaint pupils with national and international problems with the national culture and psychology that allows them to become active themselves
- To impart a military/patriotic education and premilitary training

Differentiated programs are taught in high school (secondary senior school) to encourage pupils to distinguish themselves. In the first year of high school, pupil can choose from a variety of electives with the chosen curriculum leading to a variety of high school certificates. At the end of a pupil's time at school, centralized tests are taken at two levels (A and B) which either certify a general school leaving certificate or represent a higher education entrance qualification. To this end, state test centers were founded.

The lack of state financing and the economic and social situation in society weigh heavily on the quality of general education, and often the knowledge acquired at school is not sufficient to facilitate the smooth transition to the high school. This is not a fundamentally new problem. In fact, the problem existed back in the Soviet era. It has however been exacerbated under the current circumstances. Through a system of private lessons, a methodology has been born that virtually assures teachers' economic survival.

In the light of the fact that this private extra tuition has become necessary, especially in upper grades, pupils are less motivated to learn in classes. An increasing number of pupils no longer regard school as the primary place to learn. In addition, pupils and parents are becoming critical of teachers' abilities.

General schools teach their pupils largely theoretical knowledge. Curricula, chalkboards, and textbooks are overloaded. More than half of pupils who successfully pass through the second year of high school decide to follow subjects that do not always match their skills and requirements. Many high school pupils are not capable of learning even when they have completed preparatory courses and private tuition simply because they do not have the basic skills to know how to work and their general standard of education and world knowledge is poor. Low birth rates and high levels of migration, especially in rural areas, have led to the development of many "dwarf" schools that will have to be closed in the coming years or at least restructured. Sixty percent of all schools of general education are in rural areas, but there are only 39 % of all students. Armenia has 27 special schools for roughly 2,600 children and teenagers with special educational needs (2011).

3.3.3 Vocational Education

Vocational education is currently carried out at vocational colleges and middle vocational schools attended by a total of 34,800 students (decreasing number). Depending on the profession students are studying, training at vocational colleges can last from 2 to 5 years; 3 years is standard if students have completed their secondary education. These apprenticeships cover many professional sectors: banking and finance, administration, services, industry, manual and agricultural professions, etc. Most of the graduates in 2011 came from services and transport and health care and economy, respectively, for middle vocational schools.

However in many sectors of industry, there is a shortage of qualified experts. Vocational education is heavily affected by the economic situation, especially evident through the lack of technical equipment, and it is not particularly valued by society. There is a clear divide between the generations. Older generations who were educated during Soviet era often have specific professional skills; this is not the case with younger Armenians either because they do not have vocational qualifications or because their general standard of education is poor and fails to meet the requirements of society. Out of financial necessity, workers without any professional qualifications are often employed. Many university graduates have to take up jobs in low-qualified fields just to find any form of employment.

3.3.4 Universities

A developed university system existed in Soviet times. Armenia was always near the top of the table among the former Soviet republics in terms of the proportion of a population with a university degree. Natural science disciplines were particularly well developed.

In 2011, there were 26 state universities (four of them have an international management – American, Russian, French, EU) and 42 private institutions of higher education. As in 2011, only 35 institutions of higher education were accredited by the government – six private institutions of higher education have not been accredited – many graduates do not know to what extent their qualifications will be recognized.

Some of these private universities see themselves as “elite” universities or are at least trying to gain a reputation in this direction. 95,300 students are enrolled in Armenian higher education; about one third of these attend a private university. They mainly satisfy the strong demand for disciplines such as international politics and relations, law, economics, IT, and foreign languages. Once the official approval was granted for private educational facilities, their numbers mushroomed. Consequently, there are very many higher education institutions for such a small country like Armenia. However, the manner in which these institutions are financed is not always transparent and secured and many have had to close.

Armenia’s American University was established in Yerevan in 1988. It provides selected masters’ programs and since 2013 bachelor degree courses in English. There is also a French university in Armenia, which, thanks to intensive promotion and French management, now has a good reputation. Russia supports the Slavonic university. In addition, trainees for the Armenian Apostolic Church are educated at three institutes of higher education. Although all institutes of higher education are called universities, they do not necessarily provide a broad offer of courses, conforming with the general understanding of the concept.

Matriculation is based on the presumption that students have completed 12 years of school. Entrance tests at universities are compulsory and are held in Armenian and one foreign language. The foreign language test may be omitted, especially when there are not enough applicants at private universities.

Skills in foreign language skills are a central problem in higher education: although most programs are taught in Armenian, only in some disciplines is literature available in the country’s language. The same applies to journals and internet resources. In the past, such material was supplied by Russia. Today however this usually does have its limits, and many young people do not have the necessary skills in Russian to be able to handle the material. And only in isolated cases is English beginning to replace Russian. Normally, therefore, good knowledge of one world language is a fundamental requirement for the university program. This is a major prerequisite to achieve the proximity to Europe Armenia is targeting, especially in the higher education sector, and to afford Armenia a glimpse of the world beyond its own borders.

In the Soviet past, higher education was free of charge. Today, this is only for a proportion of students (normally 20 % for the best students). Thus a large proportion of the population are excluded simply because of their financial situation. In addition, there are very few scholarships, and families will often go into debt to enable their children to attend university. Finding tuition fees for private universities is a balancing act. If a private educational institute is solely reliant on payments from students and/or their parents, it is in a dilemma. If students do not do their work, for example, or if students infringe disciplinary rules, they normally cannot be exmatriculated because this would mean losing paying customers. This gives rise to a vicious circle: quality levels drop, as will the prestige of the institute. As a consequence there will be few students, a fact which then leads to lower revenues. It therefore comes as no surprise to see that such universities are using all means available to maintain the appearance of being a good educational institution. Universities grant three types of awards:

- Bachelor degrees, following a minimum of 4 years of study
- Diplomas, following a minimum of 5 years of study
- Master degrees, following two additional years of study

On top of this, other academic titles may be acquired. Only state universities may award doctor titles. Various trusts and organizations provide scholarships for students and for graduates and academics abroad. Experience reveals this to be a double-edged sword: given the low quality of life, it is always foreseeable that qualified people will leave the country.

In 2005, Armenia, along with the other Caucasus countries, signed the Bologna Treaty in Bergen, Norway. At universities themselves, students often have difficulty providing the quality of work required in Europe. There are a number of EU programs aimed at promoting the Bologna process, and considerable funds have been invested in technical equipment at universities. Only very few chair and departments enjoy functioning partnerships with European universities. However, within the scope of the Bologna process, these would be essential to maintain academic ties, particularly for Armenians.

3.3.5 Adult Education

A systematic policy of adult education appropriately anchored in institutions is no longer present in post-Soviet Armenia. Lifelong learning is a concept that has hardly taken root in the wider population despite the fact that previously acquired qualifications have become worthless and new professional profiles, an attempt to adapt to the labor market, are in demand. Consequently, adult education takes place only sporadically in response to specific issues, and this is often provided by NGOs. On a private level, language, IT, and bookkeeping courses are offered commercially. Some western firms such as banks, software developers, and IT companies promote internal training and development programs. Others also fall

back on their employees who have been trained in the west and have corresponding language skills. Many Armenians attend development courses abroad which they have fought for privately. Employers rarely support this but subsequently gain from it.

3.4 Developments in the Current School System

In an initial first step undertaken from 1998 to 2002 and with World Bank support, Armenia created the basis for school reforms. This focused on decentralization, revamping the manner in which schools were financed and the development of the country's own textbooks, thus making pupils better equipped for school. In 2004, new state regulations were passed regarding education and standards for secondary school education.

As part of a pilot project, the 2008/09 school year welcomed the conversion of the first 10 schools into high schools. In the meantime, 91 high schools have been converted, 36 of which are in the capital Yerevan. In future, the aim is to have 150 schools of this type across the whole of Armenia.

Another World Bank project targets the continuation of education reforms. Since 2007, the key aspect on the project has been the training of teaching staff at schools, focusing on how to teach modern content with the help of modern methods. In future, teaching skills are to be improved in a 3-year cycle. In addition, pupils are to be provided with modern textbooks and materials coordinated to meet the demands of tests and standards. At the same time, teachers need to learn how to deploy these adequately. Schools are to be connected to the internet and teachers trained for working with computers. To this end, branches of the National Institute for Education are to be established in Armenia's regions. An assessment and test center is to elaborate uniform tests aimed at simplifying and harmonizing examination procedures at the end of school and for university entrance.

In view of continuing existential problems in the Armenian education system, many aspects of education currently being discussed at international level have not even entered public awareness or are not (yet) relevant for the country. Increases in teacher salaries that have been announced will hardly make it possible for teachers to have a normal teaching career, free of corruption and private tuition. The current system of coaches still secures an existence for school and high school teachers. Low birth rates and migration have led to a drastic reduction in pupil numbers, particularly in rural areas.

Language problems have also been recognized. On the one hand, there are endeavors to improve the quality of Armenian lessons, while on the other hand, pupil numbers for foreign languages are growing, and the range of languages on offer broadened. Besides Russia and (mostly) English, pupils are to be taught a third world language in secondary schools. Some disciplines at university are to be taught in a foreign language to be able to tap academic sources. A key problem remains the transfer from school to university and the development of a system of vocational education that offers a real alternative to university study.

The implementation of the Bologna protocol is still in its early days and unfortunately still restricted more to formal certificates than to aspects content, organization, and quality of a university. Projects financed through international sources are not always helpful. Funds are invested in material equipment such as computers for which there is no qualified and motivated staff. In all areas it is essential to create quality standards or implement those already available and to prevent them from being roughshod by corruption.

3.5 New Developments

Armenia's education system will remain reliant on international aid for the next few years. Necessary reforms principally fail due to the lack of material prerequisites and options, often however due to the lack of understanding of processes in a globalized world. The management of the education system is insufficient to meet modern requirements. Decentralized administrative structures are not capable of functioning fully or simply have no options open to them.

The partial privatization of the education system has only yielded improved opportunities for a relatively small group of pupils and students. In contrast, for broader levels of society, it has exacerbated the situation. This all runs counter to the state's declaration to provide free access to all education systems, including higher education, independent of parental income.

In high schools, special support and preparation for university and the preselection of particularly suited pupils could be possible if the quality of these schools were significantly higher than that of middle schools. In the coming years, both vocational education and higher education need a clearer orientation toward the labor market to give graduates a chance and to satisfy demand.

A social deal for civil servants implemented at the beginning of 2012 aims to guarantee health insurance and education for all public education sector employees and their families.

In the last few years, a number of noteworthy civil society initiatives have been born. Remarkably, such engagement has previously not been seen in Armenian society. Public demonstrations and protest appealing to the constitution have been a stand against the oligarchic structures in the country, attempting to awaken awareness in broader sectors of the population for constitutional order. Many younger people have been involved in these initiatives, most of whom are graduates from European or American universities. An example of an initiative in the education sector is the movement Democracy Comes to Schools. This was drafted in the form of interactive lessons by young activists, former recipients of Deutsche Bundestag scholarships, following their return from Germany. It was launched at the beginning of 2013 with the understanding and support of the Ministry of Education at several schools and in future is to be carried out countrywide. The program is also to be included in the ongoing training of teachers. The Armenian minister of education commented: "The citizens of the Republic of Armenia have woken up and they need to be equipped with their basic rights and freedom".

Armenia is striving to come closer to Europe, a fact documented by its signing of the Bologna process. Once bachelor and master programs have been reformulated, modular systems need to be introduced and filled with content, mobility extended, and student performance recognized. According to a state plan, teaching and research are to be more closely interlinked. This envisages further educational reforms to meet economic, academic, and societal requirements. Primarily these reforms focus on communication in the native tongue and in foreign languages, the application of information technologies, and the development of cooperations. Considering the circumstances described here, it remains to be seen which innovations will really follow these plans.

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Ferdinand Eder and Josef Thonhauser

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F. Eder (✉)
University of Linz, Linz, Austria

J. Thonhauser
University of Salzburg, Salzburg, Austria

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4.1 History and Social Parameters of the Education System

4.1.1 Cornerstones of the Historical Development

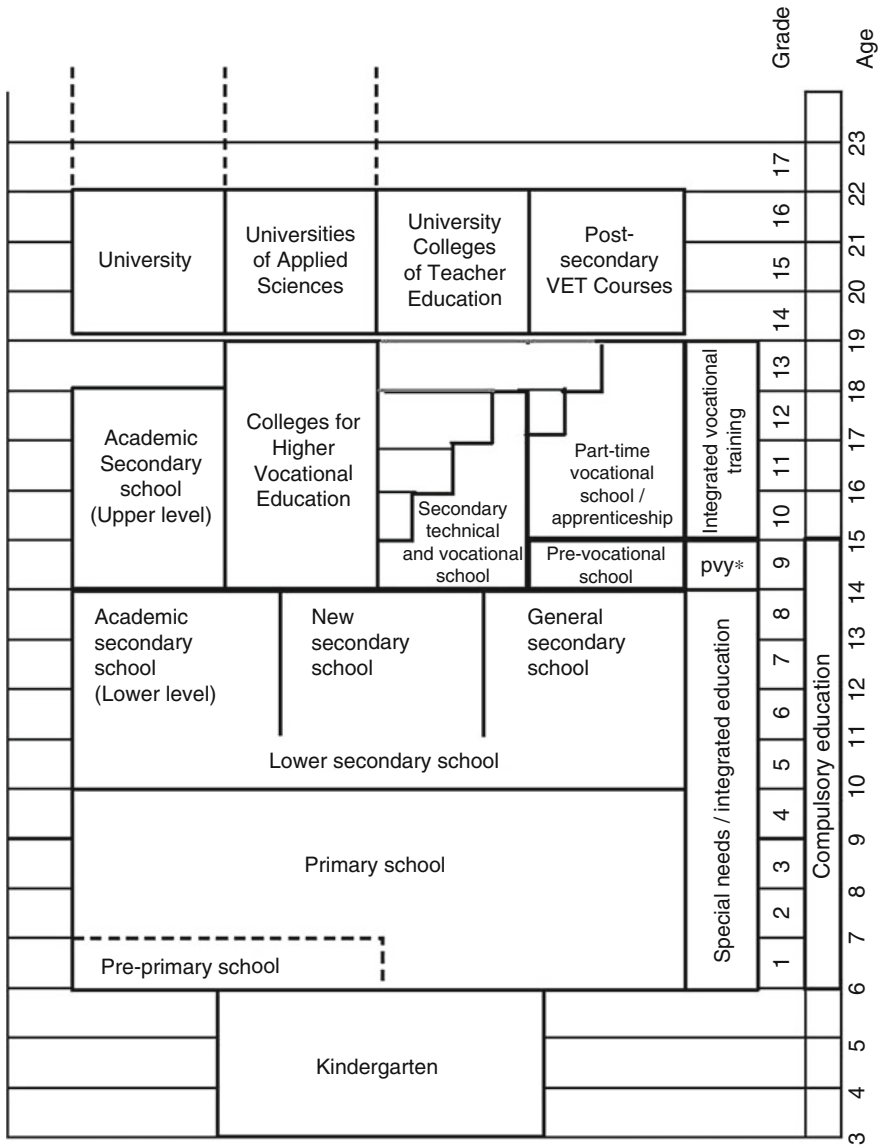
The Austrian education system developed intermittently in phases during the monarchy, the First Republic (from 1918), and the Second Republic (from 1945). It has been characterized by progressive ideas on the one hand and by a conservative, even reactionary, grip on the prevailing status quo on the other. This chapter will show how the two perspectives developed over the course of two centuries.

In 1770, Empress Maria Theresa decreed that schooling should always be a political issue. The state – and not the church – should be responsible for a functioning school system. Just 4 years later, the school system was restructured by educationalist Johann Ignaz Felbiger. Pursuant to a general school ordinance based on topographic perspectives, three types of elementary school were established: normal schools (Normalschule), i.e., model schools for the development of “best practice” in the region; secondary schools (Hauptschulen, later also called Bürgerschulen) in larger towns; common schools (Trivialschulen) in smaller locations. School was compulsory for children from 6 to 13 years. Apprentices also had to attend compulsory “repeat” lessons on Sunday until they were 20 years old. At the same time, money was set aside for the relevant textbooks.

These innovations were not accepted without resistance, although Emperor Joseph II was intent on promoting them as free education and an extension of the present school network. Following his early death in 1790, reaction was raised against centralism and against “unnecessary lessons that went too far for peasants” (Engelbrecht 1984, p. 129).

Even the grammar schools (Gymnasiums), at that time largely organized by Jesuits, were subject to strong state control under Maria Theresa and – moderately – exposed to enlightening impulses. With the annulment of the Jesuit Order (1773), the path toward reform appeared to be free. However, under the successors of Joseph II, these reforms ground to a halt: the 5-year school education, the class tutor system, the traditional curriculum restricted to relatively few (nonscientific) subjects, and the restrictive manageable access were initially retained. Emperor Ferdinand I knew how to avoid far-reaching change. It was only after the revolution in 1848 that a new course was set. Subsequent to a failed draft drawn up by philosopher and Herbart-follower Franz Exner on the reorganization of the whole education system, in 1849, a new paper entitled “Draft Organisation” compiled by him and Prussian classic philologist Hermann Bonitz formed a sound basis for the reorganization of the grammar school. Grammar schools

Austria



* Pre-vocational year

covered 8 years and integrated two philosophy-based years that counted toward university education. In contrast to the Humboldt-based grammar schools, lessons were evenly distributed between languages and history, as well as mathematics and natural science. Optional music lessons were also offered. Lessons were given by

university-trained teachers and content was prepared in two 4-year cycles, not least to support and maintain “multifaceted interests” propagated by Herbart. Bonitz later applied this concept also in Prussia at time when in Austria, concerns on the course of neo-absolutist tendencies were being expressed in conservative circles. However, the draft would have been much bolder if it were left to the will of the undersecretary of state of the newly established Ministry of Education, Ernst von Feuchtersleben in 1848. He had previously proposed unifying secondary schools and lower grammar schools to form a comprehensive school, the Progymnasium, giving equal rights to all languages spoken during the monarchy and establishing secondary modern schools (Realschulen) as secondary schools that did not teach Latin. Although not all liberal ideas saw the light of day, the establishment of a specific Austrian grammar school can be described as a major educational achievement of the nineteenth century. Another would be the Reichsvolksschulgesetz (the law on federal elementary schools) of 1869 which secured a formidable basic education, quite remarkable for that time, for all children regardless of social, ethnic, or religious background. The 7-year general secondary school gave numerous pupils access to the new-established academic institutions or universities for technology, animal health, agriculture, and commerce, and for the arts.

However, for a long time, this path was only open to boys. Even the 1848 revolution did not give the decisive impetus for the education of girls. Attempts to create a breakthrough with girls’ schools and diverse efforts from women’s associations only met with modest success. With some in part mortifying arguments and measures, girls were denied the full Matura, the university entrance certificate, and thus access to university. Until 1900, they could only achieve this indirectly and only then use it abroad. Only after the turn of the century did the situation regarding the education of girls begin to improve slowly, but this was not without its setbacks. This was certainly helped by the creation of a third type of school, the Realgymnasium, a higher secondary school that was established as a concession to reformers in 1908.

In contrast, vocational schools, which with their focus on technical, commercial, and typical women’s professions developed quickly in the nineteenth century and which also provided new educational options for the rural population, were not able to provide university entrance.

Only after the First World War and the collapse of the monarchy did the Republic of Austria face up to (re)organizing its state system. Educational policy was prioritized, thanks to the initiative of the first Minister of Education, undersecretary of state Otto Glöckel. Glöckel did his utmost to instigate educational reform measures and again pursued the idea of uniform middle school that had already had a long, if somewhat unsuccessful, history behind it. His argument highlighted improved educational opportunities for children of industrial and agricultural workers and for girls. After 1920, he triggered heated debates on the issue of education which were not only carried out in part on the streets but were also closely observed from abroad. However, Glöckel’s ideas found no consensus in the country, being instead regarded as partisan politics which they remain today. In contrast, his forward-thinking demands for reform were favorably received

in Vienna where he was president of the newly established Vienna school council, until a provoked conflict with the Catholic Church also put an end to this movement.

School laws passed in 1926 and 1927 bear a distinctive conservative character. The new curriculum for the basic school (4 years primary school plus 4 years secondary school) consciously carried out some elements of educational reform: coeducation in the higher secondary school remained strongly restricted, clear structure in this area was only partially achieved. In contrast, despite apparent defects, particular success was achieved by the new 4-year lower secondary school attended by a large proportion of youths. This provided school leavers who had achieved well with the chance to attend the higher secondary school by taking a 1-year transfer course.

4.1.2 Key Phases of Reform and Innovation in Education Policy

Although temporary changes were introduced during the fascistic corporate state (1933–1938) and the Nazi dictatorship (1938–1945), once the Second Republic was established, these laws from the 1920s were reinstated. Policy was provisional until both coalition parties, the Christian Social Party (ÖVP) and the Social Democrats (SPÖ), agreed on a new school organization law in 1962 which was then followed by other laws (in particular regarding curricula and school times). Both parties were anxious to create a legal base to educational policy and succeeded in raising the status of school laws to “constitutional level”; thus a two-thirds majority in parliament was needed for any resolution or change.

Laws introduced included extending compulsory education to a ninth school year, setting up a polytechnic course in Year 9 to expand the professional horizons for future apprentices, setting up post-secondary pedagogical academies as training colleges for future primary and secondary modern school teachers, who had previously only had to take part in in-service training with a final examination and the upper secondary form, used as a feeder for the pedagogical academy. The 5-year higher vocational school was granted the right to award university entrance qualifications. Soon after, however, there was broad consensus that this law succeeded more in maintaining the status quo than that in providing impetus for new developments.

International developments – characterized on the one hand as an “educational catastrophe” and on the other hand as an “explosion scolaire,” motivated primarily by the rise in general interest in higher education, especially among girls and women – called for an educational offensive: ideas for this were however diversified. This was reflected most clearly in a policy statement issued by the minority Social Democrat government under Bruno Kreisky (1970), expressing a strengthened will for reform (comprehensive schools, full-day schools, providing academic training for all teachers, reorganizing the dual system of vocational education, adult education). The year previously, both parties had jointly spoken about the need for a parliamentary school reform commission, for experiments on the restructuring of

schools for 10- to 14-year-olds, and for the integration of pupils with disabilities, all of which would help justify policy decisions on education and make decisions independent of cliquish thinking. A center for school experiments and school developments was set up to accompany the academic research. Despite the high financial outlay, central reform efforts were impeded by the Conservatives. Contrary to the results of the school experiments, which pointed toward the introduction of a comprehensive school system, a new school model, the general secondary school (*Neue Hauptschule*) was introduced (no tutor groups but three “streams”) in addition to the academic secondary school (AHS); supporters of the integration of the disabled had to wait until the International Year of Disabled Persons in 1981 to witness the first phase of implementation. After 1985, the trend to send children to an AHS rose sharply; in Vienna, more than 80 % and in conurbation areas 50 % of pupils of a single year attended an AHS. In some places, the new general secondary school degenerated into a “school for the rest.”

4.2 Fundamentals, Organization, and Governance of the Education System

4.2.1 Education Policy Goals

Based on the government’s program for 2007 and 2008, Austria’s current education policy for the school system can be summarized as follows:

- Targeting a general increase in the quality of education, in particular by guaranteeing vocational educational provision until the age of 18, which aims at keeping the proportion of young people without any vocational training as low as possible. This is to be achieved through measures primarily targeting the enhancement and assurance of quality and further developments in teacher training.
- Improving equality of opportunity so that success in school is not dependent on social or family background, primarily by removing the artificial barriers between the various parts of the education system.
- Integrating pupils with special needs, especially also children from immigrant families.
- Promoting lifelong learning and the resulting greater weighting to adult education. In this regard, strategies are to be developed to certify informally acquired qualifications.
- “Europeanizing” education by emphasizing foreign language learning and establishing/expanding collaborations with other countries and international schools.

The key factor for universities is to “increase the number of graduates and thereby the level of education of Austrians and to increase the number of working professionals” (Regierungsprogramm 2008, p. 202). In addition to converting the

university system in line with the Bologna architecture, government policy is aiming to improve conditions at universities by enhancing the provision of support and by aligning curricula more to the employability of graduates. Students are to be supported through more intensive consultation and the introduction of induction phases which should also help maximize student retention.

4.2.2 Legal Framework

The School Organization Law (*Schulorganisationsgesetz* – SchOG) provides the legal basis for Austrian schools setting out the aims, organizational framework, and structure of the school system and was followed by the School Instruction Law (*Schulunterrichtsgesetz* – SchUG), which regulated school-internal processes, especially the task of assessing school performance. According to the School Organization Act, schools “shall give young people the knowledge and skills required for their future lives and occupations and train them to acquire knowledge on their own initiative” (Article 2 SchOG). Young people should “be guided to pass independent judgement and to understand their social environment, be open to the political and ideological thoughts of other, be enabled to take part in Austrian economic and cultural life and contribute to the common responsibilities of mankind, living in freedom and peace” (Article 2 SchOG).

According to this legislation, all types and forms of schools in Austria are bound by the same objectives, i.e., curricular content of individual subjects is less important than the fostering of personal attitudes and behavioral patterns of children and adolescents. Furthermore, regulations govern central issues of the education system, in particular curricula and the nature of assessing performance.

Universities are called upon “to serve academic research and teaching, and the advancement, appreciation and teaching of the arts, and thereby to contribute to the personal development of the individual, and to the welfare of society and the environment,” (Article 1 Universities Act 2002). In addition, they conduct “scientific, artistic, artistic-pedagogical and artistic-scientific training, qualification for professional activities requiring the application of scientific knowledge and methods, as well as teaching artistic and scientific skills at the highest level,” (Article 3).

4.2.3 Management of the Education System

The management of the school system is the responsibility of federal, state, and local governments. Since 1962, school laws in Austria can only be changed given a two-thirds majority in parliament. This provision was by and large repealed in 2005 – without however affecting issues – creating the opportunity to adapt the school system to take account of regional needs or rash changes on the labor market.

In terms of accountability, local authorities are responsible for kindergartens, state governments are responsible for primary schools and general secondary

schools, and the federal government for academic secondary schools including lower grammar school classes. This distinction primarily affects the function of the employer for teaching staff (“state teachers” vs. “federal teachers”), the function of the maintaining body (local governments, states, federal government), and the responsibility of the school boards (district school inspector provides another level of hierarchy at state level). This interrelationship of district, state, and federal government as administrative and management organs has produced a system that is both complex and cost intensive.

In line with a centralist tradition, the school system was managed in the form of classic input management, i.e., through laws, regulations, and decrees, monitored for compliance by the school boards. At the same time, democratically controlled school experiments guaranteed that the education system was adapted to meet ongoing developments in society. Since the beginning of the 1990s, the trend has been toward deregulation and decentralization. Since then, a broad political consensus has arisen implying that future school developments should be professionally anchored in the context of the individual school and that the necessary leeway has to be provided for the following aspects of school governance:

- The administration of financial resources
- The extended participation of the school community in decision-making
- The implementation of a general curricular framework in a concrete way
- The organization of instruction regarding content and time schedules (Bachmann et al. 1996, p. 27)

This means increasing the autonomy of the school and its staff regarding regional and national development projects through an educational policy that is increasing, based on the results of national evaluation programs and international comparisons.

If it was not evident before, the Universities Act 2002 opened the door to replacing the notion of centralist input management with a management philosophy based on agreeing targets for key performance indicators that grants universities a degree of autonomous leeway and at the same time envisages accountability in the form of performance reports.

4.2.4 Financing

While kindergartens have to be generally privately financed by parents (even if local governments pay subsidies) in principle, no costs accrue for pupils attending state schools. Transport to and from school is free. Textbooks are also provided free of charge. In recent years however, a contribution of 10 % from the pupils has been introduced for both transport and textbooks.

The costs of schools are directly and indirectly borne by the federal government. The Länder are fully compensated for the expenses incurred by schools within their area of competence by the federal government in the process of fiscal adjustment.

Individual schools receive “value units” for hours taught. A basic component is sufficient to cover the cost for the standard curriculum and a second component through which schools can finance additional programs, e.g., courses or non-compulsory activities. Maintaining and operating a school is the responsibility of the owner of the school. The promotion of school autonomy is achieved on the financial level by giving schools global budgets for their overheads. They are also allowed to earn money to a restricted degree by renting premises or selling advertising space.

Since 2001, tuition fees of 360 € per semester are to be paid to study at university. From 2009, this is to be refunded to all students who complete their courses on time (plus one semester tolerance). Except for this fee, university study is free. Students have to finance materials themselves.

4.2.5 Public and Private Educational Facilities

In the 2007/2008 school year, about 5 % of primary school pupils, 5 % of general secondary school pupils, and 15 % of pupils from the lower level of academic secondary school attended privately financed schools. In the upper level of secondary school, 15 % of upper level academic secondary school pupils, 19 % of pupils in technical and vocational schools, and 10 % in training colleges attended a private school (Statistik Austria 2008b). More than one-third of students at pedagogical academies, for the training of teachers in the compulsory education sector, attended a private (confessional) facility in 2007. These figures indicate how increasingly important the private education sector has grown.

The University Reform Act of 2002 allows private universities to be established. For courses starting in 2007, a total of 1.6 % of students attended a private university. Since then, the figure has risen strongly (to 2.9 % of enrolling students).

Private schools run by an officially recognized church can claim to have their teaching staff paid by the state, but have to bear the costs of school maintenance themselves. Other private schools do not have a right to financial support from the state. As a rule, however, they do receive small subsidies. In an international comparison, private education in Austria is still on a modest scale, but has been expanding somewhat in recent years, especially in the tertiary sector. The elite nature of private education plays is significant in guiding choice.

4.2.6 Quality Management

The institutionalized system for assuring the quality of the Austrian school system comprises the following key components:

1. There is a legal base for curricula and timetables for all forms, types, and levels of school described in framework curricula or for curricula with core and extension elements (e.g., the curriculum for the lower level of secondary

- education valid since 2000). School autonomy enables schools to create their own local variations based on these curricula and timetables.
2. Teaching materials, especially textbooks, are only permitted for use in lessons following an evaluation procedure.
 3. The training of teachers is precisely regulated. Since 2007, training for general compulsory school teachers is carried out in 3-year courses at tertiary level teacher training colleges; teachers at other schools, including academic secondary schools, require a university degree. Both forms of training require extensive practical phases before teachers can be employed full time at schools.
 4. Head teachers are selected following a regulated evaluation procedure and receive extensive in-service training following their appointment, with some differences among the Länder.
 5. Together with heads of school, school inspectors carry out professional reviews of teaching staff and monitor the educational work in schools. The organization of inspectorates is based on local government administrative areas for compulsory schools, on the Länder for higher secondary schools, and within the Länder depending on the form of the school. Ultimately, the inspectorates are responsible to the Ministry of Education.
 6. The central authorities are the departments within the Ministry of Education that are responsible for the individual school forms. These departments can pass regulations and decrees in reaction to problem situations in schools arising from development projects, further education, or legal initiative.
 7. In addition, education statistics permitted under the Education Documentation Act 2002 are capable of reconstructing individual educational profiles for use in research work.

These statutory forms of quality assurance have not yet envisaged any objective measure of school achievement. The overall assessment of pupil performance is carried out by those teachers who have taught the relevant subject. The review of education standards that began in 2009 under the guise of the newly established Federal Institute of Educational Research, Innovation and Development of the Austrian School System introduced a stronger output-oriented strategy of quality assurance. In addition to the institutionalized forms of quality assurance, in the last few decades, numerous forms of local evaluation methods have been developed that have been realized in line with school autonomy.

The quality strategy for universities of applied sciences established since 1993 is based on a model of accreditation. Institutions pre-dating 1993 are subject to accreditation every 4 or 5 years, which also checks for an ongoing, efficient model of quality assurance. However, accreditation does not prescribe any particular form of quality assessment. In practice, many universities of applied sciences focus on the rigorous evaluation of teaching and the standardization of internal processes.

A central evaluation ordinance was passed in 1997 for universities, which envisaged the binding evaluation of teaching and research. With the autonomy of

universities implemented in the Universities Act 2002, responsibility for evaluation was shifted to the individual universities. In the field of research, models of peer evaluation, international rankings, and the development of quality indicators were implemented. Support for the implementation of these strategies is provided by the Austrian Agency for Quality Assurance.

4.3 Overview of the Structure of the Education System

The Austrian school system can be characterized by the following general features:

- Nine years' compulsory education (not necessarily compulsory schooling).
- Free access to public schools.
- The principle of coeducation at public schools.
- Continuous internal assessment of school achievement by teachers. Pupils' achievements are graded on a scale ranging from 1 (very good) to 5 (insufficient). A grade of 5 in a school report requires the pupil to repeat the school year, unless a conference of class teachers allows the pupil to pass on or unless the pupil passes resit examinations.
- Two types of schools, general secondary (*Hauptschule*) and academic secondary schools (*allgemeinbildende höhere Schule*) on the lower secondary level.
- High percentage of young people opting for the dual system of vocational training (apprenticeship), which involves attending a vocational school and a place of work.
- Academic secondary schools, vocational training colleges, and other upper secondary level forms that all provide the same access rights to university study.
- The differentiated secondary vocational school system, especially with regard to entitlement to study at a university.
- The separate training (despite identical school curricula) for general lower secondary school teachers (pedagogic academies) and for academic lower secondary school teachers (universities).

4.3.1 Pre-primary Education

Kindergartens are not part of the Austrian school system although there is documented evidence that they influence later scholarly achievement. Measured internationally, Austria is falling behind when it comes to the care of children, especially of 3-year-olds. Seventy percent of 3-year-olds and 93 % of 5-year-olds visit a kindergarten. However, this does hide regional and social differences. In a bid to improve the educational chances of children, especially those whose mother tongue is not German, preschool education focusing on language skills is to be given greater priority in the future.

4.3.2 Primary Education

If necessary, primary school is preceded by a preparatory year for children who are not quite mature enough to attend a primary school. General schools include the “normal” primary school until the end of Year 4 and the appropriate level in special school. Pupil numbers in both types of primary school are in decline (from 2001 to 2007 by 12 %, since then by a further 3 %). This is due in the normal primary school to falling birth rates and in special schools to the increased introduction of integration classes, not only in primary schools but also in general secondary schools. In the same period, the proportion of immigrant children whose mother tongue is not German has risen significantly. Lessons are organized in a 5-day week with between 20 and 25, 45-min lessons: with – among other subjects – languages (7 lessons) ranking higher than mathematics (4 lessons) and general studies (3 lessons). The number of children in a class must not exceed 25. From an organizational point of view, the first 2 years of primary school form a basic unit of assessment (*Grundstufe I*), which means that no child can fail Year 1, thus avoiding the burden of having a negative start at school.

4.3.3 Lower Secondary Education

The lower secondary schools include the *Oberstufe* of the primary school (only available in some regions), the general secondary school (including schools specializing in sport, music, or IT), the appropriate level of special school and the polytechnic school, Year 9, which primarily serves to meet the requirements of compulsory education, and the 4-year lower level of the 8-year academic secondary school (including *Gymnasium*, *Realgymnasium*, and *Wirtschaftskundliches Realgymnasium*). This means that after Year 4, an important decision is made for a pupil’s subsequent school career. At present, 68 % of pupils in a school year attend a general secondary school (a rising trend) and 32 % an academic secondary school. At general secondary schools, many of which also integrate special needs of children, German, English, and mathematics are usually taught in three levels of ability which has a strong influence on career chances, true for pupils even in the first (highest) level. Entrance to an academic secondary school – corresponding to the logic of the system, a school for high achievers – is decided by recommendations from the primary school teacher, based on scholarly performance and also social and regional factors. Girls are overproportionally represented in academic secondary schools. Each school teaches 45-min lessons across 120 weeks of the academic secondary school; slight differences apply between the different types of school (*Gymnasium*, *Realgymnasium*, and *Wirtschaftskundliches Realgymnasium*). Poor academic performance may lead to pupils repeating a school year or changing to the general secondary school.

4.3.4 Upper Secondary Education

The upper secondary schools include academic and vocational schools. The latter include (compulsory) vocational schools, intermediate vocational schools (*Fachschulen*), and upper vocational schools (focusing on technical, industrial, hand-crafts, agricultural, forestry, business, and commercial professions) as well as the training facilities for kindergarten teachers, educators, and social education workers. Since 2007/2008, these three facilities are no longer part of the school system; they were converted to pedagogic academies (13 locations, including eight state-run and five private academies); they remain under the supervision of the Ministry of Education and are responsible also for the in-service training of school teachers.

Pupils from the top ability level or those with at least a grade 2 (good) in the second ability level are entitled to attend all of the intermediate and higher schools in the upper level of secondary education without having to take an entrance test, provided sufficient places are available. Entrance calculations are mainly based on school achievement in the last 3 years. Grades in the second and third ability levels are adjusted by two points to facilitate comparison. A grade of 2 (good) in the second ability level is equivalent to a grade 4 (sufficient) in the top ability level. Pupils in the third ability level cannot meet entry requirements, even if they achieve a grade 1 (very good).

Pupils staying on at school after Year 8 are distributed as follows across the various schools of upper secondary education (ninth year of school 1990/1991–2006/2007):

Type of school	PTS ^a	BMS	BHS	AHS-Oberstufe	Total (%)
Proportion 1990/1991	23.4	26.5	29.3	20.8	100
Proportion 2006/2007	23.1	20.2	32.4	24.3	100

Key: ^aPolytechnic schools (PTS) here count as a facility for pupils in Year 9 at secondary schools. Vocational colleges start after Year 9.

BMS intermediate secondary technical and vocational schools, *BHS* upper secondary technical and vocational schools, *AHS* academic secondary schools

4.3.5 Special Forms of Upper Level of Secondary Education: Second Chance Provision

For pupils who have cut short their school career the first time around and for people in employment, there is a wide variety of special programs available, including (evening) classes leading to upper secondary schools and universities; different types of vocational, technical, and professional schools; and academies for trade, social workers, kindergarten teachers, and others.

In addition, there is also the possibility of gaining a partial university entrance qualification, the vocational matriculation examination, and the certificate of general educational development. Requirements to be admitted to the vocational

matriculation examination include having completed an apprenticeship or at least 3 years at intermediate vocational school. As a rule, a vocational matriculation examination consists of four parts: German, mathematics, English, and a specialist subject from the student's professional experience. A number of institutions, including the Economic Promotion Institute (*Wirtschaftsförderungsinstitut*), offer relevant courses. Another option is the certificate of general educational development. The aim of such a certificate is to offer students who have not matriculated a restricted university course in a single discipline. Completing this certificate allows the student to study this subject in all Austrian universities.

4.3.6 Tertiary Sector

Austria – when measured in terms of population – has a broad network of universities (16 universities, 4 art universities, and 11 private universities) which also include former special technical, commercial, arts, and veterinarian universities; but paradoxically, it is one of the countries with a relatively low academic rate (15 % compared to the OECD average of 24 %). Neither the 25 universities of applied sciences set up since 1995 with their total of 288 courses nor the 11 private universities – with their largely specialized orientations – have been able to improve the country's weak position in international standings. The government's educational policy is hoping that things will change once the tertiary sector has been realigned in accordance with the Bologna architecture. It is also hoping that the strong influence of social background on academic success will minimize by abolishing tuition fees and granting scholarships to those in social need.

4.3.7 Adult Education

The responsibility for adult education programs is spread across many institutions in Austria. In 2004, the Austrian Institute for Research in Vocational Education surveyed 1,775 relevant facilities for its study "Quality Assurance and Development in Austrian Adult Education." The main bodies responsible for adult education include the Ministry of Education with its subordinated Federal Institute for Adult Education, the Labour Market Service, the Länder, the local governments, the chambers of commerce, professional associations, the churches, the political parties, and the EU (through project funding).

The Länder network *Weiterbildung* represents the collaborative effort of regional working groups on adult education, the public libraries, and other adult education facilities at Länder level. The Conference of Adult Education in Austria (*Konferenz der Erwachsenenbildung Österreich*) has been in operation since 1972 and brings together ten non-profit-making providers in an independent forum.

A large proportion of adult education deals with professional development. It mainly fulfills professional needs – instigated by individual companies – and

nonprofessional personal development. Attendance at professional courses and the number of private providers of training is significantly lower than in other EU countries.

4.4 Developments in the Current School System

4.4.1 Transfer Between School Years

Austria is one of the few countries to retain the separation of pupils after Year 4. With the exception of special schools, from Year 5, there are two paths through the lower level of secondary education: the general secondary school and the academic secondary school. The Austrian system envisages that pupils with a good level of school achievement in Year 4 of the primary school are deemed by their teachers to be ready for the academic secondary school. This is usually based on grades achieved (“very good” or “good”), regardless of their validity. In a bid to cope with over-demand, in recent years, an increasing number of academic secondary schools have begun to only accept pupils with any “very good” grades. Pupils with “satisfactory” grades can be recommended for the academic secondary school at a school conference. Alternatively, pupils can sit an entrance examination. This option is almost exclusively taken up by pupils of a higher socioeconomic status of the parents.

All other pupils attend the general secondary school. Here, following an observation period of several weeks – at least however by the end of the first semester – pupils are streamed into three ability groups in German, English, and mathematics. Pupils with an academic secondary school recommendation have to be assigned to the first ability group. Pupils achieving well in a lower ability group may be “upgraded” to the next higher group (this is however relatively rarely used); more often, poor achievement may lead to pupils being “downgraded” to the next lower group. Being in the upper ability group in Year 8 is an important determinant of pupils’ chances in higher levels of school, in particular at secondary schools offering university entrance qualifications and at upper secondary technical and vocational schools. Pupils in the first ability group in all three subjects, or who have achieved “good” grades in the second ability group, are entitled to transfer to an upper secondary school. In fact, this means that in Austria, after Year 4, there is not just a bipartite split but a multiple division of pupils.

This differentiation has serious consequences for a large proportion of pupils: there are over 90 % of academic secondary school pupils, but just 35 % of general secondary school pupils subsequently attend an upper secondary school. Given a huge overlap in performance between school types and ability groups, this system is difficult to justify on the basis of documented achievement. An international overview (cf. Thonhauser and Pointinger 2008, p. 211) of the duration of integrated schools and of pupil differentiation reveals that neither the early separation of pupils nor a longer period of shared schooling *per se* has a negative or positive effect on average achievement gathered for the PISA study. However, it is striking that in all those countries that perform clearly better than Austria, separation is at

least 2 years, often 4 or 6 years later than in Austria. Nevertheless, the average performance of 15-year-old pupils achieved elsewhere is still an obviously insufficient argument for common schooling at the lower level of secondary education.

Research on school careers indicate that girls have greater educational aspirations than boys, that educational aspiration is largely dependent on the social status of the parents, and that there are significant regional differences in aspirations. Research data also reveal a double negative effect for smaller districts: (a) a trend toward stricter assessment of achievement and (b) higher aspirations in terms of pupil achievement relating to academic secondary school entrance (*ibid.* p. 223).

Since Austria has been taking part in PIRLS (Progress in International Reading Literacy Study), much more is known than before about key requirements for school achievement at the lower level of secondary education: about reading competence of pupils from Year 4. In 2006, Austrian pupils ranked mid-table (position 20). In comparison to other participating countries, Austria has:

- A relatively small proportion of pupils that has achieved the highest measured level of competence
- A relatively large gap between the best and the worst readers
- A significant overestimate of pupils' own reading abilities and only a modest indication of motivation in reading (Bos 2007)

4.4.2 Quality Trends and Assurance

From discussions that have taken place on trends in quality and on quality assurance during the last 20 years, a number of phases can be identified. Subsequent to international discussions on school quality, since the 1990s, there have been numerous attempts to take over quality assurance concepts and models from business and to adapt these to schools (TQM, ISO 9000, EFQM). These have been assigned to concepts of local profiling, which anticipated an increase in quality by making individual schools more appealing by improving pedagogical processes and making local changes and by being better able to meet regional needs and the individual learning needs of pupils. However, such a quality strategy also resulted in "bucket schools" and "bucket classes" that had to accept pupils who did not meet the appropriate requirements for the specializations on offer elsewhere.

Since the mid-1990s, the school program concept has been discussed as the core of an overall strategy. This sees trends in quality primarily as a process of acquiring information and transferring it to all levels of the school system. In this way, teachers receive information on the quality of their lessons, schools on the level of their performance, regions on the suitability of their offers for regional demand, and the whole educational system should gain information on the actual efficiency of the whole system based on a network of system monitoring measures. Individual schools should be able to set, implement, and evaluate their own development goals and thus take part in a continuous process of development. An integrated effort compiled by a working group (cf. Eder et al. 2002) was however not implemented.

Generally, the development and discussion of quality programs is characterized by the close interplay of educational administration and research, expressed in the commissioning plans that are then elaborated by researchers with relevant pilot projects being conducted. In the implementation phase, however, politicians were often indisposed to make the recommended changes to coherent concepts and instead sought to make the most of political opportunity by taking out isolated elements and making these binding.

The first PISA results were less than pleasing for Austria and triggered new discussions on improvements in quality. On the one hand, these focused on the formulation and measurement of education standards, while on the other hand, they focused on raising the quality of leadership in schools and on the continual improvement of taught lessons (cf. Haider et al. 2003; the establishment of a “Leadership Academy” and the QIBB Project in vocational schools). The most advanced proposal concerns the introduction of education standards. Following a number of pilot projects relating to their implementation and testing in schools and to their measurement, a set of statutory regulations is imminent. The notion envisages standards for German and mathematics at the end of the primary school and in addition for English at the end of the lower level of secondary education and the end of the upper level of secondary education. From 2012, standard tests are planned for one-third of pupils in each year; feedback is also envisaged for the pupils, the teachers concerned, and the schools. Furthermore, a partially standardized *Matura* – the university entrance qualification – should help bring a degree of objectivity into final examinations at the end of the academic secondary school.

Measures to monitor the education system – with participation in international comparative studies, the ongoing measurement of education standards, and the compilation of a national education report – are already quite advanced. An efficient infrastructure for this was largely created with the establishment of the Federal Institute of Educational Research, Innovation, and Development in 2008. In contrast, only few quality development measures have been implemented at school level. Independent of central discussions or of concepts in progress, in some parts of the school system, large autonomous quality projects have been initiated in reaction to special problem situations:

- Numerous schools are now testing changes to the practice of assessing achievement by using descriptors in addition to numerical grade and work targeting direct achievement (portfolios, work diaries, learn targets).
- Individual groups in school boards are testing a data-protected evaluation of individual schools on the basis of a quality framework in a bid to develop an understanding for its activities.

4.4.3 Dealing with Special Problems

Structurally, the special problems of the Austrian school system mainly concern the large number of pupils at risk – pupils that, in the PISA domain, only achieve the lowest

levels of competence – especially in the general secondary school and the lower level of the academic secondary school. These problems are presumably closely linked.

In a process that has more or less been ongoing since the 1970s, a greater proportion of pupils is attending the academic secondary school compared to the general secondary school with the result that in urban areas, significantly more than half of an age cohort attend an academic secondary school. This process is supported by the increasing numbers of pupils in urban areas with the university entrance qualification from an academic secondary school. All attempts to improve the appeal of general secondary schools for pupils and parents by profiling and specializing or by developing new models of school (cooperative middle schools) have fallen on barren ground. Even the experiment of introducing an additional comprehensive type of school, the “new middle school,” initiated in 2008, appears to be having little success. In the first year, virtually, only general secondary schools took part in the experiment.

A series of subsequent problems are also related to this structural problem. Because high achieving pupils are not taking part, what is being witnessed in urban areas is the birth of “bucket schools,” which, given the composition of pupils and the poor image of general secondary schools, are not really offering their pupils a supportive environment for development. The side effects include on the one hand a relatively low level of competence of pupils – in PISA terms, 20 % of pupils score the two lowest levels of ability – and a level of violence primarily in urban general secondary schools and in intermediate secondary technical and vocational schools that are fed by the general secondary schools. At a political level, there are currently no promising plans in sight to solve this problem.

In a bid to counter the shortfall in basic skills identified in the PISA study, a series of measures were introduced to support educational development. This included the IMST development project designed to offer teaching staff individual support to improve the quality of natural science and mathematics lessons. Since the publication of the first PISA results, schools have been provided with diagnostic instruments to improve pupil reading skills. These serve to help schools identify weak readers at an early stage and offer key training to promote reading competence. There are currently no reports on the success, or not, of these measures.

Generally, efforts in recent years have increasingly attempted to reduce or avoid underachievement at school by introducing incentives. Based on school achievement in the first semester, teachers are called on to forecast whether they expect to see learning problems in the second semester. If so, binding plans have to be drafted in collaboration with pupil and their parents. The reduction of the maximum number of pupils in a class to 25 – a measure introduced in 2008 – has not fulfilled its aim of enabling teachers to provide individual support to pupils.

4.4.4 Measures to Integrate Pupils from Autochthonous Minorities and Pupils from Immigrant Families

Roughly 830,000 non-Austrian nationals live in Austria (or approximately 10 % of the overall population). Of these, about 750,000 do not speak German as their first

language (these are primarily southern Slavs and Turks). At the beginning of primary school, many of them can only speak little German, if at all. Therefore, one of the greatest political challenges currently facing the country is how to ensure that these pupils are given opportunities for personal development and are ultimately integrated into their new homeland. Migration-related multilingualism will continue to remain a central feature of compulsory schooling. However, political opinion on integration strategy is split.

This is reflected in provisions for autochthonous minorities as well as for statutory provisions and private initiatives for immigrant children. School laws and provisions for kindergartens that fall within the competence of the *Länder* vary in their degree of minority-friendliness: unlike in Burgenland, provisions in Carinthia are somewhat restrictive, and there are a number of projects, some private, in Vienna.

For schools, the regulation on having lessons in their mother tongue and the concept for German lessons is of central importance. Pupils who do not speak German and children from mixed families are allowed to take part in native language lessons with their own curriculum as a voluntary exercise (in primary schools), as an elective (in lower and higher levels of secondary education) or, where applicable, autonomously by schools. There are two competing concepts regarding German as a second language: immigration-critical groups argue in favor of a language course that would precede normal school and begin with a compulsory kindergarten year; more immigration-friendly groups prefer to see second-language acquisition in dealings within a manageable community willing to integrate. On the one hand, the latter concept is without doubt more elaborate, but it does promise more success and corresponds better with democratic principles and is supported by a series of measures either already undertaken or announced (cf. De Cillia 2006):

- Granting the status of an exceptional pupil to school beginners with little knowledge of German for a period of 12 or 24 months
- Addenda to curricula “German for pupils whose mother tongue is not German” that assume that children mainly take part in lessons
- Initiatives for mother tongue lessons parallel to German as a second language
- Assistance for head teachers and teachers at primary schools with immigrant children (“Let’s take the first steps together”)
- Materials for mother tongue lessons with immigrant children (e.g., the trilingual magazine *Trio*)
- Efforts of integrating parents in the educational process (e.g., as part of “Mummy’s learning German” courses)
- Efforts to employ mother tongue teachers integrated in teams of competent teachers (to date with only modest success)

Success in any of these measures cannot be expected however without a more universal development within society to generate a more immigrant-friendly environment.

4.5 New Developments

The following issues are currently dominating educational developments: language courses for young children (in particular for children from immigrant families), the implementation of education standards, the broad introduction of new middle schools, the reorganization of teacher training, and efforts to have education policy decisions founded in empirical studies.

The field of language courses for young children is currently still work in progress. Decision-makers are grappling with a suitable organization form – kindergarten or preschool, selected groups of children with difficulties, or integrated support in mixed groups – and the scheduling and function of diagnostic tests. There is now political consensus that effective support – not only for children from immigrant families – is indispensable. This program, initiated in 2008, has now been reinstated after being put on ice in 2010.

Following a long period of preparation, 2008 saw education standards anchored in law. In an international comparison, Austria does however manifest a number of idiosyncrasies: skills testing at the end of schooling levels (Year 4 and 8), commitment to norm standards, justified by the needs of a differentiated school system, and the separation of standard verifications of school achievement (cf. Altrichter and Kanape-Willingshofer 2012).

Political discussions dealt primarily with who was to receive feedback of test results and what the consequences of targets not being achieved would be. At present, feedback is given relevance to different levels, i.e., pupils receive feedback on their achievement; teachers see the average scores of their classes, but not the achievement of individual pupils; school heads receive average scores for their school, but not the results of the individual classes, etc. Here, objections were raised mainly by teacher representatives afraid that teachers could be made largely responsible for the failures of their pupils. It is still to be seen what concepts will prevail in the near future. While the measurement of education standards can be seen as an instrument for monitoring the education system without really interfering in the work of the school, the introduction of a central *Matura* for 2013/2014 does signify a break with system tradition, whereby teaching staff were responsible for drafting their own examinations. In view of the considerable resistance from teachers, the introduction of the central *Matura* was postponed for 1 year.

Following the completion of limited school experiments, initiated in 2008/2009 and covering 10 % of schools, the new middle school was not introduced as originally conceived as an additional offer but as a nationwide replacement for the previous general secondary school as a standard form of lower secondary education. All general secondary schools are to be converted to new middle schools by 2015/2016. Thus, the introduction of the new middle schools as a real comprehensive school failed because of the resistance of conservative powers (ÖVP and the teachers' union)¹. Pupils will still be separated after Year 4. The new middle

¹Going against party lines, the recently re-elected governor of Tirol (from the conservative ÖVP party) recently announced school experiments for real comprehensive schools in his state.

school does away with streaming in the form of permanent ability groups, focusing instead – supported by an additional non-teaching lesson in key subjects – on individual differences with subjects.

Another building site currently affects teacher training. The competent ministries are currently working to draft a common system of training for all teachers – teachers at compulsory and higher schools for which pedagogic academies and universities are at present responsible. In the meantime, there is political agreement that a 4-year bachelor course is to form the basis of all teacher training, which can then be extended to include a master's degree. Kindergarten teachers will still not be required to have an academic education.

However, it has still not been decided what institution will accept the initiative, and afterwards be chiefly responsible, for the reform. Several universities have reacted by establishing Schools of Education comprising all the required components of teacher training such as specialist departments, instructional methodology, education, teaching practice, and further training. In some cases, collaborations are being developed between teaching colleges and universities.

Development projects are increasingly being implemented drawing on academic evidence. To support relations between research and development, the Federal Institute of Educational Research, Innovation and Development of the Austrian School System was founded, with offices in Graz, Salzburg, and Vienna. Its responsibilities include applied educational research, quality development, monitoring education, and drafting education reports. Accordingly, the institute will be responsible for organizing participation in the major international assessment programs (PIRLS, PISA, TIMSS, cf. Eder 2012) and for accompanying current national reform projects – education standards, language teaching for young children, the new middle school, the central *Matura* – and the National Education Report for Austria to be compiled every 3 years. The latter will not only contain a whole range of relevant data but also evaluative contributions from renowned academics on important issues dealing with the school system. Overall, this represents a foundation for using empirical evidence as an important principle in evaluative reviews of political reform projects.

Generally, the positive development of empirical research in education has continued over the last 10 years. Results are not only coming more into public light; they are also influencing educational policy decision-making (cf. www.oefg.at).

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 E. Lepisto (✉)

International Development Consultant, New York, NY, USA

5.1 History and Social Parameters of the Education System

The Republic of Azerbaijan lies along Greater Caucasus mountain range. The country is bordered on the east by the Caspian Sea, from where it draws its petroleum wealth. Its neighbors include Russia, Iran, Georgia, Turkey, and Armenia. The country has one exclave and one enclave.

Although a young country, the nation possesses a long history and deep culture as part of the crossing between Europe, Asia, and the Middle East. The territory was part of numerous empires, including the Soviet Union. Azerbaijan first encountered independence in the early twentieth century, shortly after its first oil boom. The republic declared its independence in 1991.

Since the late 1980s, the country has been involved in armed conflict with ethnic Armenians over the enclave Nagorno-Karabakh. This conflict, along with other disputes, has resulted in a population of nearly a million internally displaced persons (IDPs) and refugees. Although a ceasefire has been in place since 1994, nearly 20 % of the republic's territory around Nagorno-Karabakh remains occupied by Armenian forces.

Education is central for its development objectives. While IDPs and oil provide context, the process is guided by the goals of democratic reform and economic liberalization. The major educational challenge for Azerbaijan is successful completion of its ongoing reform process to ensure that young people are adequately prepared for a new future.

5.1.1 Cornerstones

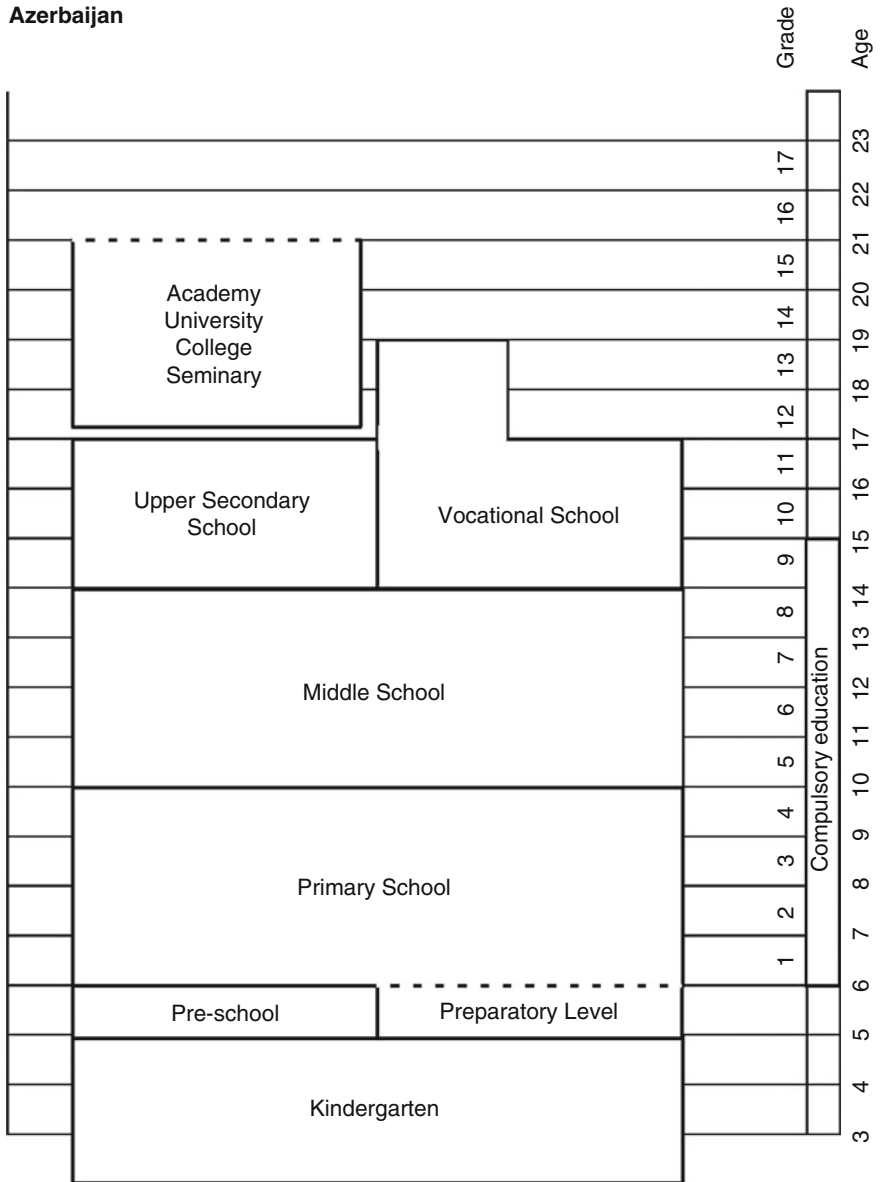
The education system of Azerbaijan, and other Muslim populations in the Caucasus, grew out of a collection of religious schools (*madressas*) and district schools. Many were established during the Khanate period (late 1750s) or earlier. Tsarist Russia introduced district schools in urban centers, primarily for urban elites, in the 1800s, but then enacted broader requirements that opened schools for the broader (rural) population during the second half of the century (Ahmadov 1995).

After the first oil boom in the 1880s, local nobles opened schools and fought illiteracy. The Jadidist movement brought education to the larger population and also supported ideas that supported the attempt at independence in the early twentieth century (Altstadt 1998).

The Democratic Republic of Azerbaijan existed between 1920 and 1921. Global changes after World War I and the Russian revolution stalled this attempt and opened the way for the Soviet control. The Soviets built upon the existing education structures by linking them into a system comprised of kindergartens, general education schools, and secondary schools.

The Soviets first concentrated on education programming on the reduction of illiteracy and on workforce training. By midcentury, most were provided with basic education followed by vocational training. Opportunities to study outside of a person's native province became more available in the mid-1960s as part of efforts connected to the space race.

Azerbaijan



Although schooling in Azerbaijan was originally intended for the children of the elite, the primary context shifted and has held firm on preparing a capable workforce. Independent Azerbaijan’s current system of education remains consistent with this principle. However, contemporary curricula and other educational capacity do not fully reflect nor respond to emerging political, social, or economic demands yet.

With the loss of the centralized, command Soviet economy, the frail education system was tested by privatization, inattention, and mismanagement. Most students, parents, and teacher centered on the entrance examination for university. Since a university diploma is a necessary requirement for aspiring youth, other aspects were neglected during early independence.

5.1.2 Reform and Innovation

At the close of the Soviet period, basic education was either followed by secondary school or a 2-year vocational school. Graduates could pursue vocational or professional education for an additional 4–5 years. Ten years were necessary to complete general and secondary education. Independent Azerbaijan increased this by an additional year.

This addition was one of the major changes included in its first Education Law, which was adopted in 1992. Early reforms included curriculum and textbook reform, with a special emphasis on the use of Azerbaijani Turkish in the Latin (Roman) alphabet in place of Russian and the Cyrillic alphabet that were mandated by new laws on language usage.

Real reforms did not begin until the Ministry of Education created a national Education Sector Reform Program (ESRP) in 1999. The ESRP was reviewed in 2004 and led to a 10-year program called the Education Sector Development Program (ESDP) which was designed on this foundation with assistance from the World Bank. Its first phase (2003–2007) focused on school rehabilitation, technology, and other improvements. This effort was joined by efforts on early childhood development, civic education, information technology, and other areas as supported by UNICEF, the Open Society Institute, US Agency for International Development, and others.

A major reform in addition to the ESDP concerned the national university entrance examination. A milestone event for most aspiring youth, this exam outranks nearly any activity in the preparation of young professionals. With such importance, it not only orients youth toward career fields necessary for economic development but also presents myriad opportunities for corruption, such as gate-keeping and other activities that took advantage of applicants. Efforts to streamline the process and guarantee transparency began shortly after independence. Joined by UNESCO and UNDP assistance, the registration and reporting process was digitalized, creating a system that has served for reforms in other countries.

Just as this new system was being implemented, the Bologna Process began to gain the attention of education reformers. A national commitment to join this process was made in 2004, and universities were instructed to begin steps to prepare their faculties and curricula. Departments began to require the preparation of syllabi, the introduction of improved teaching methodology, the opening of new departments, and the creation of a course credit schema.

Infrastructure improvements have also been the focus of recent sustainable development for education. Between 1998 and 2012, more than 1,600 schools and related structures have been built or repaired. While some funds for these

improvements originate from the national budget, the Heydar Aliyev Foundation, formed through the support of the State Oil Fund of the Azerbaijan Republic (SOCAR), has sponsored many of these projects.

The Decree of the President of the Republic of Azerbaijan on developing “National Strategy of Development of Education in Azerbaijan in 2011–2021” is the latest in recent administrative actions to buttress early reforms and to support new projects, such as in higher education. It also builds on the new Education Law (2009) and will be carried out by a newly named Minister of Education. With these efforts, Azerbaijan continues to strengthen its education sector in order to create a sound engine to drive economic and social development.

5.1.3 Context and Conditions

Azerbaijan has a total population of 9.3 million people, a grouping that is primarily comprised of Azerbaijani Turks (nearly 90 %). The country is also home to representatives of populations from neighboring areas, such as Daghestanis, Russian, Armenians, and Kurds, as well as from indigenous ethnolinguistic groups, such as the Talish, Lezghins, Mountain Jews, and Avars (SSC 2012).

Due to its location on one of the world’s great crossroads, the country has experienced rule under many of the great empires. Under Arab and Persian rule, Azerbaijani Turkish was written in the Arabic alphabet. After the first oil boom in the late 1800s and experience with Tsarist Russian rule, a local national movement turned its focus to Europe and adopted a Latin-based script. This alphabet was used during the early years of the Soviet period, but was replaced by Cyrillic in 1924. After independence in 1991, Azerbaijan’s government replaced Russian with Azerbaijani as the national language and, in 2000, began requiring all official documents to use Azerbaijani Latin.

Azerbaijan was the first Muslim nation to integrate aspects of Western society with Islamic life. The population of this secular nation includes a mix of Shiite and Sunni communities, as well as representatives of other creeds. Since most major cities are predominantly Shiite, there is a tendency to describe Azerbaijan as a Shiite nation.

Azerbaijan’s population is predominantly young, and more than half live in urban areas. Officially, the size of the capital city of Baku has doubled since the end of the Soviet period, but it may be home to more than half of the population. Other urban centers and much of the rural areas have seen massive emigration, including temporary migration to Baku, Russia, and Turkey in pursuit of work opportunities, leaving behind a fraction of their official population.

The republic also has a sizable population of refugees and internally displaced persons from the conflict over Nagorno-Karabakh as well as from other conflicts in the broader region, such as Chechnya. Although special camps and settlements were created, an unknown number of IDPs have sought residence and occupation in Baku and other urban areas. This influx has been joined by a number of provincial residents seeking employment to support their families. Temporary economic migrants to neighboring countries also comprise another portion of the population.

Local resources and infrastructure are still strained by these significant population changes, although these numbers are not officially recorded.

While the republic faces many difficulties in the transition away from the Soviet Union, its petroleum reserves have helped to fuel an economic recovery that has helped reduce the high levels of unemployment and poverty reported by the World Bank in 1997. Living conditions dropped in the mid-1990s and recent inflation has increased the cost of the daily breadbasket for the common family. During the global economic crisis of the late 2000s, Azerbaijan continued to post strong economic growth. A growing gap between the upper and lower economic classes seems apparent, given the large salaries and conspicuous consumption of high-price items by a relatively small segment of the population.

Teaching remains to be a prestigious occupation, despite low wages and a short work week. Attempts have been made to raise salaries, but these efforts have not removed efforts by teachers and administrators to augment their income through tutoring and bribes. Teaching continues to be one of the favored career fields for young girls as it allowed them to only work part of the week and devote the rest to household management and child-rearing.

Family and close friends provide the primary social safety net for most persons. Schools play an important role in helping young people to meet new people outside of their direct family and to form relationships. Budgetary restraints though limit the school's ability to provide activities or services outside of basic instruction. Accordingly, schools currently play a restrained, albeit potentially influential role in the community and the reform process.

5.2 Fundamentals, Organization, and Governance of the Education System

The State Statistical Committee reported that 6,400 educational institutions existed in Azerbaijan for the 2011/2012 school year, a decrease of nearly 600 from 5 years earlier. These schools, colleges, and other institutions serve approximately 1.64 million students. Free, public education lasts for 11 years, but a certificate of general education is awarded at the conclusion of 9 years. Most schools serve small communities surrounding them, but urban centers have magnet and other specialized schools that attract students from around the district. Most pupils complete general education, but fewer numbers go on to secondary school, vocational training, or higher education. Education remains highly valued by the populations, but reforms are still necessary to ensure that graduates gain appropriate skills and can find employment as adults.

5.2.1 Objectives

With its solid, inherited base, which allowed high literacy, established structures, and open, accessible education, Azerbaijan's reform efforts have primarily been

directed at supporting national goals of democracy promotion and economic liberalization. The World Bank-supported ESDP ends in 2014. It is designed to address two underlying needs – to educate Azerbaijani youth about their own history, culture, and traditions and to allow education to match ongoing social, economic, and political reforms. Priorities include establishing new standards, providing the capacity to meet these standards, to promote desired ethics and values among youth, and to assist them to meet the demands of a developing labor market.

5.2.2 Legislative Framework

According to the Constitution, all citizens of Azerbaijan have the right to education. The state guarantees the right for free general and secondary education, executes control over the education system, guarantees continuation of education for especially gifted youth at government expense, and establishes minimum standards. The Constitution also specifies that political parties, sociopolitical societies, and religious organizations may not be involved in education and are not allowed to establish parallel education structures. Also, citizens have the right to use their mother tongue and choose their language of education.

To provide more specific rules and regulations, an Education Law was also adopted in 1992. It focused on the decentralization of management, provisions for private education, and the need to change curriculum to reflect national and cultural themes. The law was also meant to set norms and standards for facilities, equipment, and staffing, but implementation was difficult, particularly in relation to meeting norms set for workload, class size, and salaries (Kazimzade 2004).

To address these issues, a new law was passed in 1995 to set more appropriate goals. The new law also changed compulsory education from 9 to 11 years. A ministerial decree was also issued to clarify duties and responsibilities to realize goals and guarantees set by this law.

A presidential decree in 1998 created a state reform commission that resulted 2 years later in another decree on how to improve the education system. This second decree laid the foundation for the Education Sector Reform Program in 2001. This program, with support from the World Bank, was envisioned in three stages – preparatory, objective setting, and implementation. The program was reviewed in 2004 and focused on achievements and information regarding pilot projects. The ESRP remains the republic's primary policy document for guiding reform (Kazimzade 2004).

National level initiatives from international assistance along with local level initiatives from nongovernmental organizations (NGO) have helped explore and practice. Issues include the formation of parent-teacher associations, the integration of handicapped students, textbook development, and teacher training.

A long-anticipated, revamped Education Law was passed in 2009. It is aimed at integrating lessons learned from earlier reform efforts and at strengthening the educational base of the future generation. It also includes language in support of Azerbaijan's commitment to the Bologna process, clarification on private education, and other issues currently under discussion.

Azerbaijan's commitment to the Bologna process has helped to restructure universities, develop specialized programs, introduce new fields of study, expand vocational education, and encourage higher level scholarship. Within universities, departments and programs are introducing credits and the use of course syllabi. Most though remain dependent on direction from the rectorate; accordingly, most programs are fairly regimented.

5.2.3 Governance

Under the Soviet Union, the education sector was managed by three separate government agencies. A central ministry existed to oversee general education and another for higher education. A separate committee had responsibility for vocational education. These agencies carried out their mandates with guidance from Moscow.

After independence, the nascent government experimented with several formations. Eventually a single ministry was formed. The Ministry of Education (MoE) serves as the central governing, managing, and regulating body for most aspects of education. Its mission is guided by the Cabinet of Ministers, set out in legislature, and further defined by presidential decrees. Separate institutions, such as certain universities, maintain a level of autonomy from the Ministry, but must report on their activities.

Despite decentralization, the MoE and its provincial representations continue to play a central role in nearly all other aspects of management. Most schools are monitored by school inspectors and methodologists, who often guide school performance. In higher education, university autonomy is stronger, but most institutional management remains dependent on top-down approaches. A growing number of younger faculty members are becoming more involved in commissions, departmental decision making, but not in any joint fashion. Public and private institutions are subject to review by the Ministry of Education by regulations concerning licensure and accreditation. Higher education institutes have gained significantly more autonomy, including financial control.

The Scientific Methodological Centre, the Pedagogical Research Institute, and the Education Problems Institute have been tasked with identifying potential opportunities for streamlining and other improvements. The State Students Admissions Committee exists as a separate entity to oversee the important process of university admission examinations as well as other national exams.

5.2.4 Finance

Azerbaijani schools face two major problems in terms of finance. The first is the amount of funds allocated for education. The second concerns how funds are made available to schools.

Schools are publicly financed, with amounts spent on education increasing annually. Expenditures increased from little more than a quarter of a million dollars

in 2000 to approximately 1.2 billion USD in 2008, a fourfold increase. This upward trend is not large when compared to rates for other government expenditures. In fact, education's share of the national budget has decreased. In 2003, education financing was 19.7 % of the national budget, but only 11.5 % in 2008 (MoE 2008). In 2012, this percentage continued to decrease, but the actual funds available for education increased by more than 10 times due to the growth of GDP from 2001 to 2011.

The process of financing is not directly under the Ministry of Education (MoE). During early independence, the Ministry of Finance (MoF) was granted control over most financing, particularly funds delivered to local schools and personnel, due to its stronger ability to monitor transactions. Under this system, the MoE planned budgets and submitted invoices.

The amount of disbursed funds did not always reach the level specified in budgets. The process was also too slow to meet needs. Also schools used funds when received due to the inability for funds to roll over at the end of a year. For these reasons and more, the MoE sought to increase its control over the national budget allocated for education. For example, the MoE's share of fund management was reported as 33.6 % in 2008, up from 11 % in 2003 (MoE 2008).

The majority of funds for education are still managed by the Ministry of Finance and often disbursed through local authorities and executive committees. Eighty percent of the funds from the state budget are allocated for salaries and pensions. Salaries are paid through digital transfers to local automated teller machines. The purchase of new inventories and equipment comprises 11 %, a fourfold increase from the 2008 level. An unaccounted portion is left to cover utility costs, emergency repairs, and other operating expenses, some of which may be covered locally by informal parental payments (Expert 2005). Capital investments have also increased (MoE 2008).

Although some improvements have been made, schools and universities still do not have enough funds. Their administrators also do not have sufficient authority nor training to make good use of these funds should they become available (Lepisto and Kazimzade 2008). The experience of public universities in this regard should be reviewed as public institutions are now able to charge tuition to students who did not receive high marks on entrance examinations. Public general and secondary education is officially free of charge.

5.2.5 Public and Private Sectors

Azerbaijan has only 34 private schools above the preschool level where there are an additional 37 relatively new private preschools. The majority of private educational facilities are higher education institutions and are located in the capital, although a few new schools have appeared, such as in Ganja and Shemkir. Together they service about 27,500 pupils. This figure increases to 39,600 if preschool institutions are included. The relative low number of private institutions is partially explained by a lack of demand and ability for parents to pay tuition. It is also associated with a continuing difficulty to obtain and maintain a license and accreditation. Despite

their small portion of the education market, they remain influential for education reforms since their pupils are often from established or aspiring families and the faculties are often more able to pursue innovative curriculum design and course instruction.

5.2.6 Quality and Support

The public tends to consider university matriculation and test performance as a method for measuring performance of an individual school. A state-mandated examination based on the score from a battery of five exams, which is organized into four specialty categories on the one hand and student preference for particular faculties on the other hand, places pupils at both public and private specific institutions. The score also determines whether an applicant becomes a fee-paying or nonpaying student. Accordingly, this exam is a vital turning point for the aspiring youth.

Schools with high scorers and large numbers of matriculants are able to attract pupils from other schools and to develop good reputations. This perspective persists despite the growing phenomenon of private tutoring which also prepares students for the same purpose. Tutoring usually happens concurrently or sometimes instead of attending lessons at school. A pupil's teacher may also be their privately paid tutor (Silova and Kazimzade 2003).

5.3 Overview of the Structure of the Education System

Azerbaijan's education system serves children from the age of two and upwards. While restructuring has affected capacity, the structure of the system includes all internationally recognized levels.

5.3.1 Elementary (ISCED 0)

The general facilities called kindergartens in Azerbaijan serve primarily as nursery schools for children from two up to school age. Only larger facilities allow younger children and in this case keep sections divided into two age groupings. MoE reports 1,666 preschool institutions in the country, 37 of which are private and a relatively new development. In total, they serve over 113,500 children.

Parents can drop their children off at different times of the day, and they are charged for these services. Most of these facilities tend to be open during work hours. Very few kindergartens provide services for handicapped children. According to UNESCO, special facilities also exist for ethnic minorities (2005).

Preschool facilities have faced a decline during independence. In 2000, rumors circulated that they would be closed or completely privatized. In 2008, Azerbaijan's 1,761 preschool establishments provided services to 508,000 children, about 80 %

of the number operating at the end of the Soviet period. Only one of these was a private institution. Since that time, the number of total institutions has dropped by 100, but the number of private preschools has drastically increased. The number of students in attendance also dropped by nearly 11,000. This change seems to indicate increasing privatization of this market.

5.3.2 Primary (ISCED 1)

In 2012, Azerbaijan had over 4,500 general schools with about 1.3 million pupils and approximately 150,000 teachers across Years 1 through 11. Most general schools offer classes for pupils in Year 1 through 9. Less than 400 of these schools offer only primary education. Eighteen private schools offering primary and secondary education are part of this number. Primary, middle, and secondary school pupils often attend classes in the same school building. To accommodate their numbers, pupils attend in shifts. Less than 30 % of all public schools offer two or three shifts, which are attended by less than 20 % of all pupils (SSC 2012).

Primary education includes Years 1 through 4, although some schools also feature a Year '0' or preparatory level, which is distinct from kindergarten. Children must be aged six at the beginning of the school year to enter. Enrollment has remained high, in part due to international efforts and attention. UNESCO reports high efficiency and high continuation rates (2005). Pupils in Years 1–4 totaled 489,099, with 1,537 in private schools (SSC 2012).

5.3.3 Lower Secondary (ISCED 2A)

Middle school lasts for 5 years from Years 5 to 9. In 2011–2012, pupils in Years 5 through 9 totaled a little more than 604,000, with approximately 3,668 more pupils at private schools. At the end of this cycle, pupils complete one of two state exams. Pupils wishing to continue on an academic track take one of these exams, while others wishing to complete their education or go on to vocational tracks take another one. While the transition from primary education to secondary school does see some loss in attendance, it is after the completion of this level that nearly half of all students choose not to continue on the academic track. Successful completion is marked by the award of a school leaving certificate.

5.3.4 Special Schools for Handicapped Pupils

Azerbaijan has 19 specialized schools, some of which are boarding schools. Nine schools are for the mentally challenged; two each for the blind, the deaf and dumb, and those with speech deficiencies; and one for those stricken with poliomyelitis or cerebral palsy. Some boarding schools serve orphans, including economic ones. These schools serve about 6,100 pupils (SSC 2012).

Mainstreaming handicapped pupils has only recently begun in Azerbaijan, typically supported with international assistances and support centers. About 575 special needs students attend classes in general education schools. An unknown number of handicapped children never enter school. Their parents do not receive appropriate support or guidance for rearing and training these children.

5.3.5 Upper Secondary (ISCED 3)

After the completion of general education, pupils may follow a professional or vocational track for the next 2 years. Most of those on the academic track remain in the building where they had general education for Years 10–11. In some of urban schools, class groups are divided into academic orientation and are assigned teachers with similar interests and strengths. Azerbaijan's general education schools serve 604,000 pupils. Another 54,456 pupils attend one of the republic's 59 specialized schools. One of these schools is private and has 1,220 pupils. An additional 2,500 pupils study at one of the country's seven correspondence or night schools (SSC 2012).

Many secondary school pupils are oriented not on class work and lessons. Instead they focus on preparation for the university entrance exam battery in one of four areas. As a result, a high number of pupils may or may not attend classes, preferring to study alone or with the aid of private tutors. Regulations on private schools have made it difficult for private secondary schools to open. Accredited universities tend to be able to open special preparation schools for secondary pupils. A state exam for completion of secondary education is being prepared and will be administered by the MoE.

5.3.6 Postsecondary (Non-tertiary) (ISCED 4)

Secondary school graduates have the right to attend vocational and professional schools. Some of these technical schools also offer a four- instead of 2-year program for more specialized training. Those who attend vocational school attend classes in a new building with a new set of children. Most provincial centers have a few technical schools, or technicums, that offer these 2-year programs in education, medicine, music, technical trades, or general training. While many can attend a local school, particularly young women attend a local technicum, others may go seek more specialized technical schools, including military, agricultural, and arts schools. Azerbaijan has a total of 107 vocational institutions – 47 professional schools and 60 technicums – with a combined total of 28,993 students. None of these schools are private. Azerbaijan has 375 additional institutions that offer courses in sports, creative arts, and other fields to nearly 226,500 children and young people (SSC 2012).

5.3.7 Tertiary (ISCED 5A, 5B, 6)

Azerbaijan has 51 institutes of higher education accommodating 143,000 students. About 19,600 of these attended one of the 15 private institutions in the country. The public institutions include academies, universities, institutes, colleges, and a seminary. All can offer bachelor programs and many offer a master's program (SSC 2012).

In 2011–2012, Azerbaijan had 31,200 students in bachelor programs, with 11 % in correspondence courses and 13.5 % at private institutions. A total of 4,225 were studying in master's programs, with more than one fourth in correspondence programs and about 10 % at private institutions. The private institutions had a combined student population of 14,000. In 2012, about 2,700 entered private bachelor programs and 100 entered master's programs at these institutions (SSC 2012).

The World Bank reports that Azerbaijan has very low enrollment at university – between 19 % and 20 % of the potential population (2011). The State Students Admission Commission however reports a slightly higher trend. However, its figures show that less than 60 % of all secondary school graduates apply for university and less than half are actually accepted. It is important to note that this group is only a portion of all youth of relevant age, since an unreported number of students do not move from general to secondary education.

5.3.8 Adult and Further Education and Training

The law of Azerbaijan provides lifelong learning, typically for vocational training. Several ministries maintain institutions for professional development, particularly for in-service training. Civil society organizations and private companies now offer courses in new areas of specialization, including language learning, computing, accounting, and project management.

5.4 Developments in the Current School System

Over its first two decades of independence, Azerbaijan has built on a strong foundation for further development based on its early reform programs. Subsequent reform packages and relevant legislation have been created to cover nearly all aspect of reform. Some efforts, such as the independent textbook commission and the creation of a school-finishing examination, have been met with resistance. However, implementers have typically used these opportunities to adjust the programs to ensure sound enactment. Other efforts, such as the financing scheme for merit-based students at universities, have supported larger goals of institution autonomy.

5.4.1 Transition

School wastage persists in Azerbaijan. Retention is problematic after middle school, partially due to the informal costs of further education. It also arises from the population's mistrust of the ability of schools to prepare their children for the labor market (Williams 2000). This problem also affects other issues, not only in terms of choice of institution or discipline but also in matters relating to corruption (Silova and Kazimzade 2006; Lepisto and Kazimzade 2008).

5.4.2 Quality Management

Quality management in Azerbaijan is still partially dependent on the republic's Soviet tradition of quotas and statistical reporting. Quality is often measured by reported amounts of students instead of being based on merit-based evaluation. With Azerbaijan's participation in Education for All, TIMSS, and PISA, quality management is receiving more focus in schools. It is anticipated that results from commitments pertaining to the Bologna Process will result in quality improvements across higher education.

While these improvements are underway, schools tend to be monitored and controlled by inspectors and methodologists from provincial education offices, local representations of the Ministry of Education. However, professional associations, NGOs, and even Parent-Teacher Associations (PTA) have begun to influence school performance as have media and other public reviews.

5.4.3 Special Problems

The MoE has focused efforts on physical infrastructure, primary school attendance, curriculum reform, and teacher training. Problems such as violence are limited, but other issues such as corruption, nonattendance, and other substantive aspects of education still require attention.

5.4.4 Integration

Azerbaijan makes allowances for ethnic minorities, foreign-born pupils, and others. Public schools with Russian as a primary language of instruction had been popular for second or third generation immigrant students and certain ethnic groups. Special schools for temporary residents were established during the Soviet period to allow them to study in Russian as a group. With the language shift from Russian to Azerbaijani in the 1990s, the popularity of Russian language schools dropped as most parents attempted to ensure that their child would possess proficiency in Azerbaijani. However, the Russian schools are still popular with those who intend

to travel to Russia for trade or study. Some schools also offer language training and instruction in target languages, such as Georgians living in the north.

Most foreign-born pupils tend to attend private schools, particularly at the few institutions that offer instruction in English. Where some private primary and secondary schools are attended by the children of expatriates, universities have seen a growing number of students from Turkey, Iran, India, and nations in Africa. Some of these institutions have a history of hosting exchange students, such as the State Oil Academy, but many more are gaining the experience needed to serve this community better. Other institutions have also established strong relations with foreign universities and have used their advice to improve their curriculum, management, and structure. For these foreign-born students, the government provides preparatory instruction so that they may attend public schools.

Children of expatriate workers, usually from the petroleum or diplomacy sectors, typically attend private schools, some of which are foreign and not locally licensed. Accordingly, this grouping is not part of integration efforts.

5.5 New Developments

Since 1991, Azerbaijan has struggled to establish a strong education system, and the nation should be proud of its many advances. Its achievements have been fuelled by a strong oil-based economy and a desire to meet global standards. In the last decade, the republic has taken a number of important steps, including the passage of a new Education Law of 2009 that will bring its higher education system in line with that found in Europe. Its primary and secondary levels are also going under a number of extreme changes, encouraged by the World Bank, the UN, and other international agencies.

Perhaps the strongest sign of an educational recovery is the assignation of a new Minister of Education in 2012. A member of the upcoming generation, the new minister is western-educated and has already demonstrated his acumen in economic development. The changes he will oversee hold strong promise as does the state's shift away from Soviet-era leadership. Similarly, Azerbaijan is enacting a number of reforms that will help education managers and faculty at all levels gain the skills and experience needed to perform the work envisioned by the reforms.

However, this is not to say that Azerbaijan's reform is complete, but merely that more pieces are finally being set in place. The largest challenge that confronts the country is its need to educate its new generation (and to train older age cohorts) so that they may find local employment. Without a stronger connection between education and the skills needs of the marketplace, the government of Azerbaijan will be hard-pressed to deliver reform, to meet desired standards, or to show that the country has reached a maturity level similar to upper middle income countries.

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Stephan Malerius

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Transcriptions of the descriptions of educational facilities use either the Belarusian or Russian terminology, depending on the source.

S. Malerius (✉)

Konrad-Adenauer-Stiftung, Düsseldorf, Germany

6.1 History and Social Parameters of the Education System

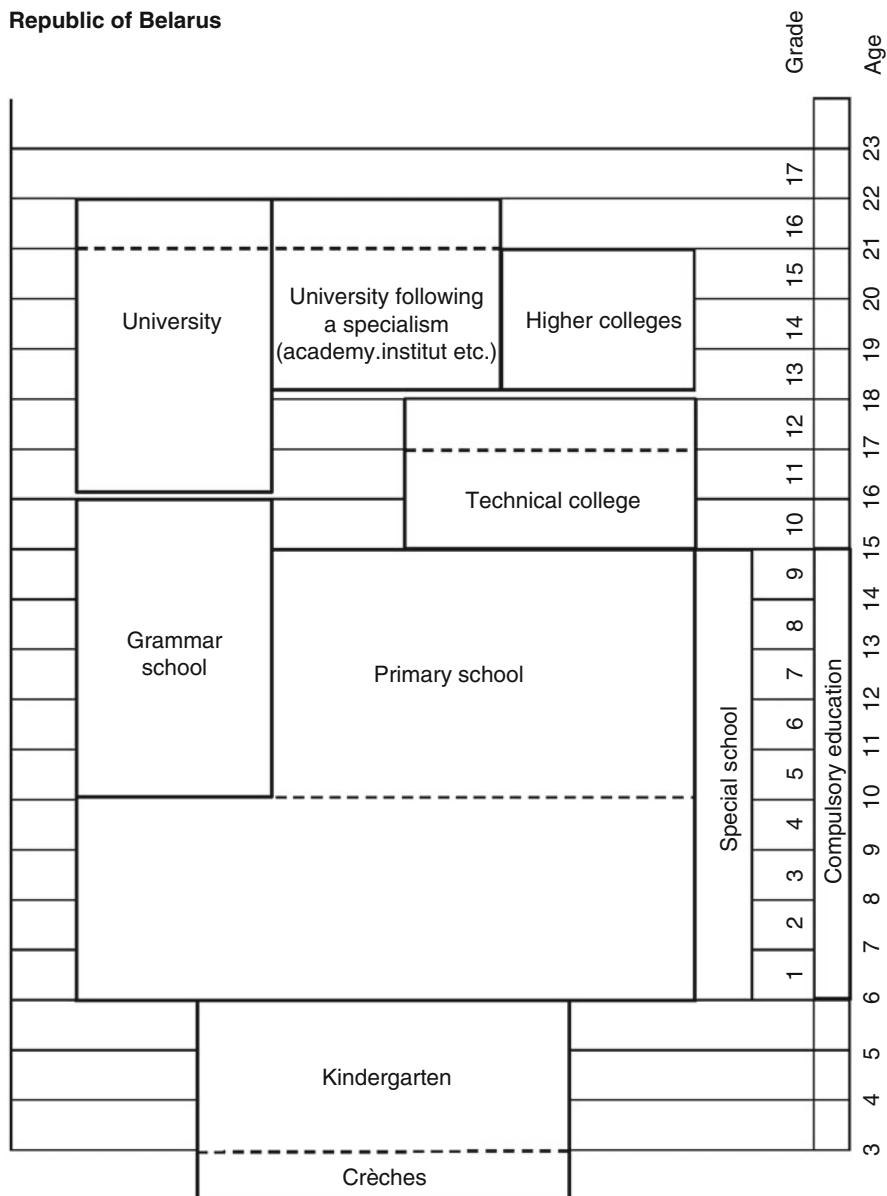
6.1.1 Cornerstones of Historical Developments

The first noteworthy period of Belarusian history was in the thirteenth and fourteenth centuries – a period that relates to the Grand Duchy of Lithuania, Ruthenia, and Samogitia. This is also known as the Golden Age of Lithuanian and Old Belarusian culture. The Old Belarusian dialect not only served as the official language of the state, it was also the language of culture and education. Trade relations with the West brought the Lithuanian-Belarusian Grand Duchy into closer contact with the European humanist tradition of education. Following the division of the Polish-Lithuanian-Belarusian Republic in 1772–1795, the territory of Belarus fell under the power of the Russian Empire for the next 150 years. During this time, both the Belarusian language and culture (as was the case with Polish and Lithuanian) were prohibited. Nevertheless, in the course of the nineteenth century, a noteworthy class of intelligentsia emerged. In the wake of the October Revolution of 1917, the country attained its own state structures for the first time in its history. However, in 1918, the newly proclaimed People’s Republic of Belarus was rapidly integrated into the Soviet Union. In the 1920s, the country experienced a short phase of relative cultural independence: in terms of education, the school system was extended and compulsory schooling introduced. Universities and theater with a national focus were established and the first literary journals appeared. However, during the Stalinist terrors (1930–1950), a large proportion of the Belarusian intelligentsia was liquidated. Following the Nazi-German attacks on the Soviet Union in June 1941, Belarus became part of the Reichskommissariat Ostland, an administrative unit of the Greater German Empire. More than two million Belarusians fell as part of a systematic policy of killings or as a result of direct war activities. The reconstruction of the education system that had suffered severely in World War II was followed by a phase of renewed expansion in education. At the same time, the education system was Russified. During this period, the school system was based on the Soviet model of the single type of school and was obliged to follow Marxist-Leninist ideology which formed the basis for the whole education process and was embedded in a centralized system of education organized by Moscow. At the same time, Belarus took part in the process aimed at modernizing the Soviet Union: at the end of the nineteenth century, 26 % of the population in the territory of the present-day Belarus could read and write; by the 1930s, illiteracy had by and large been eradicated (Zaprudnik 1998, p. 103).

6.1.2 Key Phases of Reform

With the collapse of the Soviet Union in 1991, Belarus was able to restore its state independence. In the beginning, the still highly influential Belarusian national movement chalked up a number of cultural successes in the early 1990s. As early as December 1990, a Language Act was passed that declared Belarusian the sole

Republic of Belarus



official language. Important state reforms aimed at making the overall education sector more democratic were introduced and social science subjects gradually freed from their Marxist-Leninist content. New syllabi and textbooks emerged for subjects such as history and “The Individual and Society” that were characterized by an

effort to de-ideologize world history, to promote an independent national history of Belarus, and to convey knowledge of the principles of an open society and parliamentary democracy.

However, the movement to de-ideologize the education system was shelved at the end of the 1990s by President Lukashenko under the pretext that it was promoting nationalism. Many of the protagonists who worked on the education reforms in the early 1990s cooperate today with NGOs and are fundamentally opposed to the current national policy on education.

6.1.3 Political, Economic, and Cultural Framework

When independence was proclaimed in 1991, the Republic of Belarus faced a difficult task, as was the case with all the succession states to the Soviet Union: in nearly all aspects of society, people were having to cope with the Soviet legacy while the country was massively affected by the economic consequences of the transformation process. Unlike its neighboring Baltic states or its Western neighbor, Poland, this process was put to an abrupt end in the mid-1990s by the election of Alexander Lukashenko as President of Belarus. From 1996, Lukashenko installed an authoritarian regime in Belarus that tried to secure its long-term power by reviving Soviet traditions, particularly in the field of education. Although the economic conditions for many educational facilities in Belarus today are better than in the Ukraine, for example, given the political developments in the country, however, schools and universities are subject to strict ideological control that put handcuffs on the personal and intellectual liberties of pupils, students, and teachers alike. The dearth of democratic ideals is having a negative impact on many aspects of the education system in Belarus, beginning with the interference in the content of some subjects such as history or politics, including a regulation obliging university applicants to submit a political “clearance” document when applying for certain subjects at the university and to present this to the competent executive committee, through to restrictions on students who want to take part in international exchange programs.

Because Belarus is not a member of the European Council and only participates to a limited extent in programs of European “neighborhood” politics, the country is largely cut off from discussions on European politics and did not take part in the IEA study at the end of the 1990s nor officially in the subsequent PISA studies. From the point of view of European education information systems (such as Eurydice), Belarus is literally an unknown territory. Even in the country itself, in terms of information on public education, there is a considerable shortage of reliable data that would facilitate comparison.

In the meantime, the 12 years of Lukashenko’s presidency have led to a gradual hardening of authoritative tendencies from the state, in society and in the education system. Since the highly disputed referendum on the constitution in 1996 which saw the President’s powers extended, there have been no democratic elections; all democratic structures in the country (independent parliament and justice, free

press, etc.) have been systematically undermined or liquidated. The political developments of recent years are discernibly reflected in education reality. The Ministry of Education is again making an effort to ascribe positive characteristics to the term “Soviet,” and reforms in the education system are explicitly oriented toward Soviet standards.¹ And for society at large, life in an authoritarian state has become something of normality. In the independent Belarusian education portal (www.nastaunik.info) (*nastaunik* = teacher), a mother has posed the rhetorical question of whether it makes any sense for schools in Belarus to teach children about democracy, when later they will have to find their way in an undemocratic society.

6.1.4 Teachers

The reputation and social status of the teaching profession in Belarus has fallen dramatically compared to the Soviet period. At the same time, despite the relatively low salaries, there has been no mass exodus of teachers out of the education system as has been the case in other countries in Central and Eastern Europe that are also in transformation (e.g., Poland, Ukraine). This can be in part justified by the fact that the Belarusian economy is by and large stable, albeit at a very low level; salaries are paid on time; and officially, there is hardly any unemployment. Given the country’s isolation and the massive ideological indoctrination through the state-owned and state-controlled media (with includes some extremely negative propaganda against the EUR), there is hardly any independent information on the quality of life of people living in other European countries. As a result, for a large proportion of the population, there is no incentive to emigrate from Belarus.

Given that no new teaching staff seems to be entering the profession, school operations in Belarus seem entrenched: older teachers fight doggedly against retirement (which also has financial reasons), and young teachers do not want to teach in schools. This is also a consequence of the clearly conservative teacher training with its system of compulsory allocation (*raspredelenie*) in the first few years after entering the profession. Good graduates from colleges of education are allocated to better schools, weak graduates to village schools, and the weakest graduates to areas contaminated with radiation. As is the case with nearly all civil servants, teachers in Belarus have been working on a contractual basis (*kontraktная osnova*) for the past few years. This means that they can be dismissed at any time. This gives the state the power to use teachers directly for their own political ends. This policy is quite common – as was the case during the Presidential elections in March 2006. Because most polling stations are located in schools,

¹“The national education institute makes a significant contribution towards implementing the principal directions of national education policy. Fundamental and practical studies on current issues in education and training will be conducted . . . The best achievements of general education schools from the Soviet period will be retained and developed further” Website of the Nazional’nyj institut obrasowanija. <http://nio.edu.by/main.aspx?uid=33640>.

teachers and head teachers were obliged to cooperate in falsifying the voting. People in Belarus are aware of the role of schools in falsifying the voting and of the dependence of teachers – there were numerous incidents across the country of teachers being dismissed because they did not want to become involved in falsifying the election. School management and head teachers are not obliged to give the real reason for a teacher’s dismissal.

6.2 Fundamentals, Organization, and Governance of the Education System

6.2.1 Legal Foundation

The education system in Belarus is based on the principles of equality of access to education for all children, the unification of performance requirements, and the state’s financial obligation to provide education.² Article 49 of the constitution passed in 1994 guarantees the right to free general and vocational education. The Law on the Education System of the Republic of Belarus was passed as early as 1991. A new version of the Act was passed by the Belarusian parliament on 19 December 2001 and came into force on 19 March 2002 (*Zakon 2002*). The Act includes objectives and measure of educational reform, which for the most part were repealed in mid-2008.³ It highlights the following general principles of national education policy:

- The primacy of education
- The general obligation of elementary education⁴
- Implementing the transition to compulsory general lower secondary education
- The accessibility to preschool education, to vocational-technical schools, and to lower levels of colleges and universities that are subject to entrance examinations
- The continuity and consistency of levels and stages of education
- The national-cultural principles of education
- The priority of general human values, human rights, and the humanistic nature of education
- Scientific methodology
- The ecological nature of education
- The democratic character of educational administration
- The secular character of education (*ibid.*, Sect. 1)

²Cf. the study on the issue by Siarhei Vetochin (2004) (www.nihe.niks.by/eng).

³See Sect. 6.4.

⁴For details of elementary education, see the following explanation.

In addition to the Law on Education, other laws are also relevant and deal with languages, national minorities, rights of children, vocational education, higher education, and national educational guidelines for the legal organization of education in Belarus. Programs issued by the Council of Ministers and decrees issued by the President and the Ministry of Education provide other key legal support.

6.2.2 Managing the Education System

The education system is centrally structured. In other words, all major responsibilities lie with the Belarusian Ministry of Education which is accountable for the development of the education system in the country. All types of learning and training facilities – from nursery schools to universities – are subordinated to the Ministry. Below the Ministry, school administration departments in the capital Minsk and in the regions (Brest, Gomel, Grodno, Minsk, Magileu, and Vitebsk) are responsible for the implementation and control of decisions on school policy. At a regional level, the responsibility for educational policy is in the hands of the education committees and the departments of education and youth under the supervision of the local authorities. The consequences of state dominance include the strong bureaucratization of the whole education sector and a system of control that, with its strict hierarchical structure, reaches from the Ministry of Education through to the individual schools and universities. The Ministry of Education is the only authority in the country that can admit new educational facilities and approve curricula; it is one of the strongest authoritarian structures in Belarus and has nothing like the democratic character laid down for it in the constitution.

In principle, the Law on Education permits non-state institutions at all levels of the education system. However, the establishment and operation of general education private schools is subject to the strictest of guidelines. As a result, the whole education system is de facto controlled by the state.⁵

6.2.3 Funding the Education Sector in Belarus

Education and health have only recently become a priority for the coming years for the Belarusian government. In 2006, education accounted for 6.9 % of GDP, putting the country ahead of Russia (3.5 %), Japan (3.6 %), and the USA (5.4 %). In 2008, the expenditure on education rose by 16 % year by year, and a further rise of 36 % was planned for 2009. President Lukashenko declared that the additional funds would be provided to increase teacher salaries (from January 2009 by 20–25 %), to improve equipment in schools, and to publish course books. According to the

⁵“... (the) system of education in Belarus consists of state institutions with virtually no private presence. As a result, all school activities are rigidly organized, formalized and governed by numerous state authorities,” 30 October 2004, IEARN Executive Council.

government program, "Education and Training 2010," 10 % of the GDP is targeted for funding education in 2010.

The relatively good funding of education is now visible: the quality of buildings and technical equipment (computers, Internet access) of schools in Minsk and in other regional centers (Gomel, Brest, Vitebsk) appears to be relatively good. The official line is that after the state had taken care of renovating school roofs, drying out cellars, and repairing plumbing systems in the 1990s, only in the last 2 or 3 years has it been possible to concentrate on matters such as specialist curricula for schools, school management, and equipping schools with computers. However, the Minister of Education, Redkow, recently declared that over 300 million Euros had been spent on renovating schools and other educational facilities from 2005 to 2007. In addition, a national program is currently in progress to support rural schools. The equipment available in rural schools is often of significantly poorer quality than that in schools in urban areas.

However, there are serious doubts about the genuineness of official positions taken by the state and of official statistics: an international expert who had spent a long time at Belarusian schools speaks of another "concept of objectivity" in Belarus than elsewhere and of national statistics that are very often unscrupulously manipulated. In reality, it is difficult to find a working photocopier in schools, and even elite schools in Minsk find it difficult to provide Internet access for their pupils. It is obvious that many educational facilities are still underfinanced. Moreover, schools have virtually no options open to tap independent sources of funding. At an international conference on funding in education that took place in Krasnoyarsk, Russia, Belarusian delegates reported that there are many more options available in Russia to acquire additional funds. Private grants, scholarships, or support from international foundations hardly exists in Belarus, and collaboration between schools and entrepreneurs in the country is difficult for the simple reason that businesses are subject to a uniform rate of tax 15 % higher than in Russia and executives have no interest in announcing their economic success by making public donations. On the other hand, it is considered good form to support schools by making donations.⁶

6.2.4 Quality Developments and Control

6.2.4.1 Curricula

General education schools in Belarus follow the Soviet legacy of pursuing scientific-based content in education, of setting high standards on the level of knowledge required of pupils, and of bringing up children in an atmosphere of conscious discipline. The curriculum of the general education secondary schools issued by the Ministry of Education focuses on a timetable that comprises four

⁶Cf: Kolas, Wladimir, *Sibirskija Uroki*, 2005/2006 as <http://www.nastaunik.info/metoda/experience/russia>

components. At the center is the “base component,” a uniform and binding syllabus for all general education schools in the country. The “state component” allows the school administration of individual schools to modestly pursue a specific profile. The “school component” is based on the decision of the individual school to offer some lessons as options. Finally, the “elective component” – one or two lessons per week – allows schools the chance to offer differentiated lessons for weak achievers. The high proportion of the basic curriculum component in Years 1–9 is justified by the fact that “the foundation of general education is laid in precisely these years which is necessary for pupils who will continue their education in specialist profiled schools or in classes with specialist training as well as for pupils who commence vocational training in specialist schools or in technical colleges or for those who start work without completing their secondary education” (Latsch and Andreev 1997, p. 50).

The heavy burden of this basic workload on children has become a serious problem. Although the number of hours pupils spend at school has fallen in comparison to the Soviet school (during the Soviet Union, pupils in Years 5–9 spent between 30 and 33 h at school, while in Belarus in 2003, the school day lasted between 27 and 32 h), school achievement has risen enormously. Because one of the most important criteria in the state assessment of the quality of schools is the percentage of pupils successfully graduating from school who pass the entrance examinations at the various universities, there is very little incentive for schools to develop elective elements to promote school life. As such, schools are increasingly becoming places that primarily prepare pupils for university entrance examinations.

In the past, it was quite usual to deal with increasing problems of large workloads by cutting the number of lessons in music, sport, handicrafts, and “people, society, and the state” (the Belarusian equivalent of political education). However, in the light of tightened quality controls and the increasing significance awarded to sports, this practice has receded somewhat recently. Nevertheless, the main problem lies in the value attributed to the school’s placement in national assessment by most teachers and head teachers. First position, certificates or awards in mathematics, natural sciences, or languages are the prime indicators of a school’s quality.

6.2.4.2 Quality Control

“Monitoring the quality of education” (quality control in general education schools) has been the key concept in the educational reform process in Belarus since 2003. The Ministry of Education coordinates this through its department for educational control (Department kontrolja obrazovanija Ministerstwa obrazovanija Respubliki Belarus). Education standards have been defined in Article 11 of the Education Act. Quality development and evaluation is regulated by Articles 44–47 “On management and control in the education system.” Accordingly, standards are constantly reviewed and updated. The Ministry of Education is responsible for improvements in classroom-related quality developments and for compiling appropriate concepts and instruments – as part of a quality assurance program in the school system, state bodies regularly initiate and conduct controls in the form of:

- Self-control (internal controls with the educational facility/school)
- Inspections of educational facilities (school inspections carried out by the department of quality control at the Ministry of Education in conjunction with the education committees and the departments of education and youth, supervised by local authorities)
- Inspections of the local education committee and the departments of education and youth (organized by the department of quality control at the Ministry of Education with the aim of evaluating education-related activities of these bodies and of the quality of education in educational facilities under their supervision)

All of the criteria to be evaluated are regulated in detail in the appropriate guidelines and range from hygiene requirements through to the qualifications of teaching staff.

Quality assurance is one of the points in the education sector in which Belarus is keen to keep one eye on European standards. In official documents, the country positions itself in comparison with the EU and homes in on indicators from the catalogue issued by the “Standing Group on Indicators and Benchmarks” to verify achievements scored by the Belarusian education system. The study “European approaches to quality assurance in education and their comparison with approaches in the Republic of Belarus”⁷ compares practically all European indicators with Belarusian indicators. Belarus is currently drawing up proposals for the “integration of the Belarusian quality assurance system in the overall European system.” In 2005, there was an attempt to conduct a study based on PISA criteria in schools in the oblasts of Minsk and Vitebsk and in the city of Minsk. However, this was only possible to a limited extent because Belarus did not pay the necessary fees and did not receive the full version of the text.

The “scheduled” state controls of schools are ambivalent as an instrument of quality assurance: on the one hand, head teachers admit that they are basically necessary for the development of a school, while at the same time, the school’s management and teachers openly moan about the extra bureaucratic work involved (protocols, reports, etc.). Time lost due to these controls is one of the reasons for the supposed passivity of many teachers. In addition, school inspections are also used/misused under the pretext of quality assurance as an instrument of ideological control of schools.

6.3 Overview of the Structure of the Education System

The structure and system of the Belarusian school system is strongly characterized by the educational tradition inherited from Soviet times. This is reflected both in the

⁷Cf. Sagumjonowj, Šelkovič, “Evropejskie podchody k ocenke kačestva obrazovanija i ich srawnenie s podchodami v Respublike Belarus” http://www.ibe.unesco.org/cops/russian/EU_App_Edu_Quality_%20Assesment.pdf

continuation of the “incomplete/complete secondary education” and in the differentiated form of vocational education. The system of fundamental education (asnounaja adukacyja) comprises seven levels: preschool education, general primary education, general secondary education, vocational/technical education, specialist colleges, higher education, and postgraduate education (Zakon 2002, Sect. 7).

Preschool education facilities – crèches for 2- and 3-year-olds and kindergartens for 4–6-year-olds – form the first level of the education system in Belarus. At the core of the school system is the *general education lower secondary school*. School education usually begins with the “base school” (*bazavaja škola*) which is made up of a 4-year primary school and a 5-year lower secondary level. The basic education is concluded upon completion of Year 9 at the lower level of secondary school (previously: “incomplete secondary education”) and thus also compulsory education. Some lower secondary schools also have a 2-year upper level for pupils to gain their “complete secondary education.” In the country, there are some independent primary schools and secondary schools without a primary school element.

After the country’s independence was proclaimed, Belarus set up *grammar schools* which also provide complete secondary education. Grammar schools start in Year 5 and some of them have feeder primary schools on site. *Lyceums* are school offering complete secondary education in conjunction with a specialist subject.

Vocational education in Belarus is provided by *vocational/technical colleges* that offer full-time programs primarily for pupils who have finished the lower level of secondary education. Furthermore, the system of specialist colleges (*sjarednjaja spezyjal’naja adukacyja*) inherited from Soviet times has continued to be developed. These provide professional qualifications for specialists who have completed upper secondary education and award certificates between apprentice and degree level. The system includes technical and other forms of colleges and “higher” vocational colleges (*vyšejšae profesijnae vučylišča*). Access is open to pupils who have completed basic school, secondary education, or an apprenticeship.

6.3.1 Preschool Education

In Belarus, preschool education is “the first level of general education, a fundamental social-public form in which professional work is conducted with children” (Latysch and Andreev 1997, p. 43). Since the political independence, the preschool sector has been characterized by three developments. Firstly, the structure, funding bodies, and profile of facilities have diversified considerably. In addition to the more traditional crèches and kindergartens, there are also playgroups, day care centers, kindergartens for school-aged children, “pro-grammar school classes” (preschool facilities attached to a grammar school offering 11 years of education), and special kindergartens for children with special educational needs. Secondly, in the early 1990s, numerous companies withdrew from maintaining preschool facilities. Only some of these facilities were transferred to state/communal funding. At the same time, private facilities were established. In urban areas, some kindergartens were established offering a special profile – mainly in the arts or foreign

languages. Thirdly, the proportion of children attending preschool facilities is on the decline. A decisive factor for the dwindling demand for places in preschool facilities is the increase in fees parents have to pay.

6.3.2 School Enrollment

In Belarus, there is a strict, uniform system of starting school based on the age of children. Current regulations stipulate that children should join the preparatory class from the age of 6 years. There is a degree of flexibility, however, that takes account the development of the child in enrollment, the wishes of the parents, and local circumstances. The most important criterion for enrollment is the health of the child.⁸ At present, these are the following main forms of enrollment:

- Acceptance of 6-year-olds in the preparatory class of the kindergarten
- Acceptance of 6-year-olds in the preparatory class of the primary school
- Acceptance of 7-year-olds in Year 1 of the primary school

6.3.3 The Primary School

Primary school comprises Years 1–4. Primary schools are either separate schools or part of a “base school,” of a “complete secondary school” or of a grammar school. In rural areas, there are also primary schools with more than one school year in a class. The number of lessons rises from 21 lessons in the preparatory class to 24 in Year 3. In the first year at school, there are no marks and no homework, and lessons are taught in a playful manner.

6.3.4 Secondary Schools

General basic education comprises the primary school and the lower level of secondary education up to Year 9. It is obligatory for all pupils healthy enough to attend school. General basic education at the lower secondary level takes place in Years 5–9 of basic schools, complete secondary schools, and grammar schools.

Grammar schools usually begin in Year 5; some also have a feeder primary school part of the school. They differ from other general education schools in that they have a special profile – arts, social sciences, or mathematics/natural sciences – and offer more lessons per week. Pupils can enter the upper level of the grammar school once they have passed an examination. Pupils in the lower level of the grammar school also have to pass this examination.

⁸See Sect. 6.4.

Upper secondary schools provide a “complete secondary education” which is required before pupils can later study at a university. The main forms of this type of school are the upper levels of the “complete secondary school,” the grammar schools, and the lyceums. Grammar schools are to set themselves aside from complete secondary schools by offering secondary education “at a higher level” (Latysch and Andreev 1997, p. 49). *Lyceums* are upper secondary schools which combine specialist subjects within a complete general secondary education. There are either separate facilities or part of a higher education facility. Complete secondary education qualifications are also acquired at vocational education facilities (especially technical and general colleges).

6.3.5 Schools for Children with Special Needs

In addition to the types of school mentioned above, the school system in Belarus also includes other school-based facilities and forms of schooling. This mainly includes:

- Schools for children with special psychological and physical needs
- Boarding schools for children with health impairments
- Boarding schools for orphans
- “Working colonies” for criminal children and teenagers
- Lessons at home for children not able to attend school for health reasons

According to the Education Act, the system of special schools in its narrow sense includes facilities for mentally handicapped children; children with speech, hearing, and sight impairments and impairments of physical development; and for children with multiple handicaps (Zakon 2002, Sect. 39).

6.3.6 Vocational and Higher Education

The vocational-technical institutes were particularly affected by the economic transformation process that followed in the wake of independence at the beginning of the 1990s because their former sponsor companies, which provided support in the form of material help, provided internships and placements, and accepted graduates, were largely discontinued. As a consequence, the reputation of vocational-technical education has fallen somewhat in the public eye. The same can be said of the specialist secondary schools. A specialist secondary education today comprises a 2–3-year course at a technical college (*technikum/vučylišča*) that follows the general basic education (9 years). A specialist higher education comprises a 2–3-year course at a technical college following the conclusion of the complete secondary education (11 years). Passing this program allows students to study at a university and may also entitle students carry forward credits.

Higher education in Belarus is provided for by both public (state) and private (non-state) facilities. Courses at state universities are free for those students who pass the entrance examination. Private universities charge tuition fees. Higher education in Belarus is divided into the following institutions: traditional universities (full universities), universities following a specialism (academies, institutes, etc., such as pedagogical institutes for teacher training), and higher colleges. For the first three institutions, bachelor and master degrees awarded after 5/6 years were introduced in 1994 (Zakon 2002 Sects. 32 and 33). In 2005, there were 44 state-run higher education facilities in Belarus (25 universities, nine academies, five colleges, and one technical school) accommodating 272,900 students and 13 private higher education institutes for 58,800 full-time students, 1,800 part-time students, and 107,600 students enrolled for distance learning programs.⁹ While half of the state institutes of higher education is legally assigned to the Ministry of Education, the other half is assigned either to one of the other ministries – such as the Administration Academy of the President of the Republic – or to other state bodies (Belarusian 2001, p. 3ss.). The Ministry of Education is responsible for accrediting and licensing higher education facilities and for controlling the application of state education standards within them. The responsibility has been repeatedly abused in the past. In 2004, the Ministry rescinded the license to operate as an institute of higher education from non-state European Humanities University (EHU) in Minsk. Reasons of form or substance were given for the decision. However, the key factors might well have been the EHU's tight international network and its education programs that were oriented toward modern Western educational standards. In 2005, the EHU was reestablished with international support in the Lithuanian capital Vilnius, 200 km north of Minsk. In the meantime, the EHU has become a success story: a European University in Belarus has become a Belarusian university in Europe. Political reasons led to the closure of the Belarusian Jakub Kolas lyceum in 2003. However, lessons continued underground; lessons took place privately in teachers' homes or in specially rented apartments; natural science subjects are taught in the school holidays in Poland where partner schools provide Belarusian pupils with classrooms and technical equipment.

6.4 Developments in the Current School System

6.4.1 Trends in Pupil Numbers: Closure of Schools

For years now, demographic developments in Belarus have led to a continuous decline in the number of pupils. As a consequence, the number of schools is falling by an average of 100 per year. Within a period of 9 years, between 1995/1996 and

⁹IAU, World Higher Education Database (WHED), Belarus – Education system, INSTITUTION TYPES & CREDENTIALS; at: http://www.unesco.org/iau/onlinebases/systems_data/by.rtf

2004/2005, the number of schools fell by 14.6 %.¹⁰ According to plans issued by the Ministry of Education, another 444 schools are to be closed, primarily in rural areas, in response to the expected fall of 257,000 in pupil numbers by 2010. In 2006, the Ministry introduced measures to counter the shortage of pupils by enrolling 5-year-olds in school. However, this did nothing to change the fundamental trend.

6.4.2 Health Provision in School

The educational administration, NGOs, and teachers unanimously agree that one of the biggest problems in Belarusian schools is the state of health of children. This has steadily deteriorated in recent years. Illness among children under the age of 14 rose 38.2 % in 2004 compared to 1993 and was 2.6 % up on 2001. For teenagers, the figures were 34.1 % and 6.3 %, respectively.¹¹ According to a variety of sources, less than 15 % of children today can be classified as completely healthy. Respiratory problems (70 %) are the most frequent illnesses, which is one of the reasons why the state has invested in renovating school buildings in recent years.

The main causes of the poor state of health of pupils have been cited as the deplorable ecological situation in cities (especially the quality of water), poor nutrition, the consequence of the Chernobyl catastrophe, and overproportional stress placed on pupils by the curriculum (number of lessons, the burden and amount of homework, the number of examinations).¹² The latter in particular has led the Ministry of Health to warn the Ministry of Education about controlling compliance with the prescribed number of lessons actually provided in schools. The Ministry of Health has even taken to deploying external controls carried out under the auspices of supervising hygiene and epidemics (*sanepidemstancija*). In 2004/2005, disciplinary proceedings were instigated against 600 officials for permitting school children to do “overtime.”

Schools and state bodies have reacted to the problem with numerous school-based and extracurricular adolescent projects on the issue that deal with ways to lead a healthy life (*zdorowy obraz žizny*). Even the national education institute in Belarus is concerned with developing pedagogical recommendations for the healthy organization of the educational process in general educational facilities.

¹⁰Cf. National contribution of the Republic of Belarus, presented at the international forum “Educating for sustainable development.” “On the implementation of the national action plan for the UNESCO program ‘Education for All’” Minsk 2005 (<http://cis.bsu.by/second.aspx?uid=53&type=Article>).

¹¹Cf. Information on “Mothers’ Week.” The state of health of children. Guaranteeing the necessary preconditions for the education process, nutrition, and improving the state of health of children. At: <http://www.minzdrav.by/med/article/see.php?nid=16&all=0>.

¹²Even the Minister of Education, Radkow, has drawn attention to the poor state of health of children. As part of the “Children Belarus 2006–2010” program, seven new subprograms were developed to provide a solution to the problem, four of which target the improvement of the state of health of children – cf. interview with Radkow “Planeta detstva” in *Patschatkowaja schkola*, Nr. 5 http://www.p-shkola.by/journal/2006/05/m_01.htm.

The “improvement of educational work in respect of pupils’ health care” has been targeted as a priority by numerous schools.

6.4.3 Belarusian and Russian as the Language of Instruction

The legal and practical status of the Belarusian language remains a controversial sociopolitical topic, but is hardly discussed in public. A highly developed literary language at the end of the Middle Ages, in the subsequent centuries, fell under the shadow of Polish on the one hand and Russian on the other. It was only from the end of the nineteenth century and up until the 1920s that it began to gain a certain standing as the language of instruction in schools only to lose it again in the decades that followed.

Following World War II and in contrast to the practice in other Soviet republics, the language of instruction in higher education in the Belarusian Soviet Republic was not the language of the titular nation, but was exclusively Russian. As a consequence, the formal right to choose between Belarusian and Russian as the language of instruction in general education schools was more or less suspended in reality. This was primarily the case in those cities where the Russian language was widespread. Schools that were taught in Belarusian were to be found in rural areas, but had to struggle with the reputation they had of being backward. In 1990, a Language Act declared Belarusian as the only official language. Consequently, in the general school system, there were schools taught in Belarusian (*škola z belaruskaj movaj navučannja*), schools taught in Russian (*škola z ruskej movaj navučannja*), and schools where some subjects were taught in Belarusian and some in Russian. In the primary school, the other language was taught as a second language in three lessons per week. In the capital, Minsk, the proportion of pupils in Year 1 who were taught in Belarusian rose from 19.2 % in 1991/1992 to 58 % in 1994/1995 (Sadowski 1998, p. 367).

In May 1995, a referendum on the official language was conducted in Belarus, which formally put Russian on an equal footing with Belarusian. Since then, the titular language is again on the decline although the Education Act still guarantees freedom of choice in the language of instruction (Zakon 2002, Sect. 5). In 1995/1996, only 19.5 % of Year 1 pupils in Minsk were enrolled in schools where Belarusian was the language of instruction (Sadowski 1998, p. 367). In the years that followed, this proportion continued to fall: in 2001/2002, only 3.8 % of pupils in the preparatory class had lessons in Belarusian (Languages of Instruction, p. 4). Although more children enrolled in Belarusian preparatory classes in rural districts of the country in the same school year (in the Minsk oblast, it was 39.5 % and in the Brest oblast, it was 28.1 %), the overall trend here is also in decline (ibid).

In the present situation, there are still schools whose external communication (website, flyers) is in Belarusian, but whose normative documentation (decrees, instructions, etc.) at the level of the Ministry of Education is often linguistically mixed, i.e., Belarusian paragraphs are inserted into largely Russian texts. Despite the considerable resistance in educational administration currently discernible, Lukashenko continues to repress the Belarusian language: shortly, before the school

year 2006/2007 commenced, the Ministry of Education issued a letter to schools demanding that Belarusian history in Years 9 and 10 be taught in Russian – a step that can only be seen as a further Russification of the education system in Belarus. In every respect (TV, newspapers, textbooks), Russian is the dominant language in Belarus, and the use of Belarusian is seen as a sign of an oppositional, democratic attitude. Although Belarusian is only sparingly used in everyday situations, all Belarusian citizens have a passive knowledge of the language.

6.4.4 Reform and Counterreform of the School System

In a program on the Main Directions in the Development of the National Education System passed by the Council of Ministers in 1999, comprehensive reforms for the following 10–15 years were concluded that envisaged, among other things, an increase in compulsory schooling (i.e., of basic education) from 9 to 10 years and in general secondary education from 11 to 12 years and the successive introduction of new timetables and syllabi. Following heated discussions that have also taken place within the government, these reforms, which have actually been conducted over a number of years, must now be deemed to have finally failed. In a decree “On Questions of General Secondary Education” issued by the President in June 2008, reforms initiated in a number of areas are to be repealed. General secondary education is to be reduced back to 11 years – the first year to have completed school after 12 years would have been finished in 2009. Schooling is to be offered in a 5-day week (the regulations on this were to date inconsistent); the sixth day is reserved for sport and elective subjects. However, there is still no clear definition of the elective subjects. The school year is to be extended by 1 week until 1 June. Counterreform has also brought about various changes in the subject content: world history and Belarusian history have been merged; music and art are only taught in the primary school. Repeals of reforms were principally driven by Anatoli Rubin, deputy head of the Presidential administration.

Numerous official commentaries and discussion forums have expressed doubt time and again about whether the counterreforms have been sufficiently prepared and well thought out. Pupils who have learned in a system based on a 12-year school program now have to readjust. Textbooks that have only recently been compiled based on a 12-year system now have to be replaced by books intended for an 11-year program. On top of this, universities are concerned about a massive increase in applicants for academic years 2008/2009 and 2009/2010. Despite all the criticism, it is at least noteworthy that public discussion about reform and counterreform in the education process is being conducted in Belarus despite its social and political authoritarian structures. On its Internet site, the central organ of the Presidential administration, the *Sovetskaja Belarussija* newspaper, published a week-long discussion on educational policy in which hundreds of teachers and parents took part. And Member of Parliament, Vladimir Zdanovitch, chairman of the education committee in the Belarusian parliament, criticized the counterreform as a return to the Stone Age.

Nonetheless, the speculation is rife about the real background to the counterreform. It has been reported that the Presidential administration calculated the cost of the complete implementation of reforms at well over 100 million Euros. Given the country's budgetary constraints, this would have been a sum the country could not afford. In addition, reports have also pointed out the serious disparities on the Belarusian labor market. These suggest that the education reforms instigated have resulted – in connection with global trends and in the light of delayed economic reforms and an obsolete industrial infrastructure – in an oversupply of academics in legal and teaching professions on the one hand and in a shortage of technical labor such as engineers and specialists on the other. An element of the planned education reforms from 1999 would have also included the restructuring of higher education, making it better able to face the challenges of a modern economy. However, for pragmatic and political reasons, these reforms were also stopped. The concern was that in having an improved higher education system to educate experts and specialists for the European labor market, local labor would still not be able to compete.

6.5 New Developments

The future of schooling and higher education in Belarus is closely connected to the general political and economic development of the country. In this respect, the Presidential election of 19 December 2010 was a negative censure. The brutal breakup of a peaceful demonstration on election night and the massive repression of a democratic opposition and civil society that continues to this day basically nullified a careful internal liberalization and set back Belarus and its social development by some 15 years. The country has become even more structurally isolated from Europe, and its precarious relationship to the EU has been frozen now for 3 years across virtually all aspects.

Symbolic of this is the fact that Belarus is the only country not to have joined the Bologna Process. This makes it difficult for Belarusian university degrees to be recognized internationally and hinders academic exchange with Europe. Although Belarus undertook efforts to move closer to the Bologna Process under its new education minister, Matskevich, in 2011 even submitting an official request to join the process in November 2011, the move was rejected by the Bologna Follow-up Group under the chairmanship of the Danish education minister at the beginning of 2012, citing the country's flouting of fundamental principles and values of European higher education such as academic freedom, the institutional autonomy of universities, and students' rights of codetermination.¹³ This rejection is in line with the position of numerous other European and international institutions (European Council, EBRD, ILO) and can be seen as a political reaction to the repressive,

¹³Cf. "No Bologna for Belarus" in <http://www.europeanvoice.com/CWS/Index.aspx?PageID=178&articleID=74079>.

authoritarian development in Belarus following the Presidential election of 19 December 2010. This is reflected in one specific area: following the 2010 election, several rectors of leading universities in Belarus who were held responsible for the politically motivated de-registration of students were banned from entering Europe.

The decision of the Bologna Follow-up Group might have been motivated in part politically. It did however have its base in fact as demonstrated by a study published by the European University Association in 2012 on the autonomy of universities in Europe: in two respects (organizational and academic autonomy) Belarus finished bottom, in one respect (personal autonomy) next to bottom and in another respect (financial autonomy) third from bottom of all the countries in Europe.¹⁴ A report from three Belarusian NGOs (*Centre for the Development of Student Initiatives, Solidarity and the Public Bologna Committee*) illustrates this classification and documents numerous examples of the frequent repressive interference exerted by official bodies in the educational process and in the autonomy of universities.¹⁵

Below this structural-political level, the picture is somewhat different: numerous Belarusian students actually do take part in European exchange programs such as Erasmus, Mundus, or Tempus,¹⁶ the exclusion of students for political reasons has declined significantly since 2006, and lecturers can actually – with few exceptions – teach the content they want to in Belarus provided the courses and lectures are not politicized and there is no public criticism of the government.¹⁷ What is particularly difficult is providing a coherent description of the social situation in Belarus. Individual cases such as the dismissal of the historians Andrei Charniakevich and Ihar Kuzminich from the university in Grodno at the beginning of 2013 fly in the face of these developments.

Except for the universities and with an eye on the overall education system in Belarus, Sviatlana Matskevich states in a current finding (2011/2012) that most qualitative and quantitative indicators (such as state expenditure on education, average teacher salaries, numbers of pupils and teachers) describe a negative trend.¹⁸ The old, often still Soviet structures and the ideological character of the whole education system remain unchanged. The Code of Education, which came into force in September 2011, lays down the authoritarian structures of educational

¹⁴A comment on the problems in the areas mentioned can be found in a contribution by Artyom Shraibman: “How far is Belarusian education from European standards?” In: <http://belarusdigest.com/story/belarusian-education-needs-more-freedom-13721>.

¹⁵Cf. <http://bolognaby.org/?p=84&lang=en>.

¹⁶Cf. the current European Commission report on higher education in Belarus available at http://eacea.ec.europa.eu/tempus/participating_countries/overview/belarus_tempus_country_fiche_final.pdf.

¹⁷Cf. the article by Artyom Shraibman, “Four Western Myths about Belarusian Higher Education.” In: <http://belarusdigest.com/story/top-four-myths-about-belarusian-higher-education-13917>.

¹⁸Sviatlana Matskevich: Education between “Export” and sclerotization. In: Belarusian Yearbook 2011, Minsk 2012, p. 158.

management and leaves virtually no leeway for structural reform. Elsewhere, Matskevich describes what would be necessary to guide the Belarusian education system toward a common European educational process – allowing the return of the European Humanities University, in exile since 2005, to Belarus.¹⁹ Under the current regime in Belarus, such a development would, however, appear to be highly unlikely.

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¹⁹Sviatlana Matskevich, *Education in Belarus: Reform and Cooperation with the EU*. In: *Belarus and the EU: From Isolation towards Cooperation*. Berlin 2011, pp. 53–69.

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Christiane Brusselmans-Dehairs

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As agreed, Christiane Brusselmans-Dehairs left the team of authors upon completion of her work on the English edition of *The Education Systems of Europe*. A Belgian colleague of hers had intended to replace her but has not delivered. The editors have therefore decided to retain most of Ms. Brusselmans-Dehairs's contribution to the 2nd edition published in 2004 with some updates.

The chapter below reflects developments up to 2010.

C. Brusselmans-Dehairs (✉)
University of Gent, Gent, Belgium

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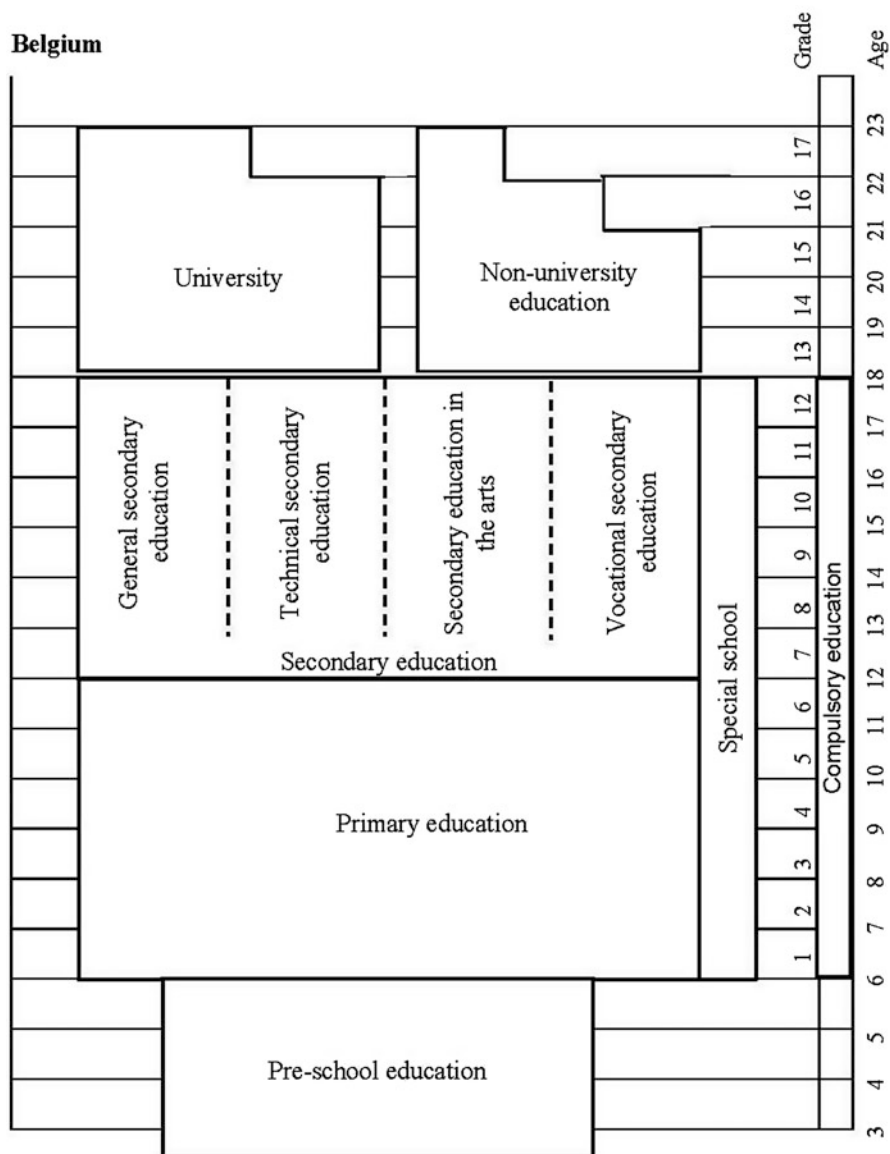
7.1 History and Social Parameters of the Education System

Belgium borders on France, Germany, Luxembourg, and the Netherlands as well as on the North Sea. Its capital, Brussels, is also the capital of the European Union. The country has an area of 30,528 km² and a population of just over 11 million people (2013). Its population density of 328 people per km² is the second largest in Europe. However, the population density does vary – from 429 people/km² in the north of the country to 194 people /km² in the south. There are three official languages: Dutch, French, and German.

Belgium is a constitutional monarchy with a representative parliamentary system of government. The single and centralized state of Belgium was founded in 1831. Beginning in 1970, the constitution was reformed in several steps. As a consequence, the political, legislative, and administrative structures of the state evolved toward a federal system. In this federal system, there are now three authority levels, each with its own legislative and executive bodies: the Federal State, the communities, and the regions. The Federal State has a national parliament and national government. The three communities – the Flemish-, the French-, and the German-speaking communities – are responsible for cultural and personal-related matters within a certain linguistic area. In truth, there are four linguistic areas: a Dutch-speaking area (the language spoken in the Flemish community), a French area, a German area, and a bilingual area (Brussels). There are three regions: the Flemish Region, the Walloon Region, and the Brussels Region. They are responsible for all matters fully or partly related to their respective area. In Flanders, the community and the region coincide politically, and there is one Flemish parliament and one Flemish government.

As a consequence of recent state reforms, the educational responsibilities of each community are vested in its own education minister (executive power) and the community itself (legislative power by means of acts). Except for a few restrictions, each community has had full autonomy in the area of education since January 1989. The Federal Government only has competence for the pensions of the staff of educational establishments, for imposing compulsory education and for determining the minimum conditions for gaining a degree. The Flemish system is responsible for 58 % of school-aged children, the French system for 41 %, and the German system for less than 1 %.

From the beginning of the last century until 1970, the number of immigrants was relatively stable. Indeed, for a long time, Belgium sought workers from outside its borders, particularly for the traditional industries in the French-speaking part of the country. A wave of immigration between 1970 and 1981 increased



the total number of foreigners by more than 25 % and brought many Turks and Moroccans to Belgium. Their children now account for half of the nonnative Belgian population under the age of 15. Currently allochthones represent 9.1 % of the total Belgian population (4.2 % in Flanders, 11.3 % in Wallonia, and 27.2 % in the Brussels Region).

7.2 Fundamentals, Organization, and Governance of the Education System

7.2.1 Current Educational Guidelines and Aims

The central task of educational politics is to guarantee the quality of the education system. The fundamental educational concept, as established by Jacques Delors (1996), of “learning to do, learning to live together, learning to be” provides a framework for the actual mandate over key issues in education policy. This mandate, structured around knowledge, skills, and attitudes, must also be differentiated and adapted to socioeconomic diversity. Quality education should therefore teach and develop values that promote a tolerant, caring, and humane society in which misunderstanding, intolerance, and isolation are abolished. Tolerance and solidarity should be stimulated, as well as critical citizenship. In short, the main aim of the education mandate is to empower young people through education and to prepare them to be responsible citizens.

7.2.2 Legal Foundations

The Belgian Constitution decrees that everyone has a right to education. In order to guarantee this right for all children, there is compulsory education. The 1983 Compulsory School Attendance Act obliges parents to send their children to school for 12 years: compulsory education starts on 1 September of the year in which the child reaches the age of 6 and lasts 12 full school years. From the age of 15 (in some cases 16), young people can opt for part-time education and part-time work. However, the majority of these pupils continue to receive full-time education. Compulsory education finishes at the end of the school year in which the pupil reaches the age of 18 or when she/he has gained the certificate of secondary education (irrespective of age). All children who reside in Belgium are subject to compulsory education, i.e., also children of foreign nationality. Children who reside in the country illegally also have the right to be enrolled at a school. They have the same rights as “legal” pupils. Compulsory education does not, however, mean compulsory schooling: children do not have to go to school to learn. They can also be educated at home. Parents who opt for this procedure (in practice there are very few) must inform the Department of Education. The authorities check that all pupils who are subject to compulsory education are actually complying. If this control reveals that a particular child is failing to comply with the rules, the parents can be punished by the courts. The Belgian Constitution also decrees that access to education be free of charge up to the end of compulsory education. Primary and secondary schools that are funded or subsidized by the government are therefore not permitted to demand fees. Access to nursery (non-compulsory) education is also free of charge. Moreover, for secondary and for higher education, there is a system of study allowances for parents on low incomes.

7.2.3 Managing the Education System

7.2.3.1 Freedom of Education

One of the most important principles governing the system is freedom of education (1831, Article 17 of the Belgian Constitution). This means that the organization of educational institutions may not be submitted to restrictive measures. In other words, every natural person or legal person has the right to organize education and to establish institutions according to her/his wishes. Nevertheless, if officially acknowledged certificates and diplomas are to be awarded, and if subsidies from the communities are to be granted, legal stipulations and rules must be observed. Parents also have freedom of choice regarding the type of education or the school they select for their children.

7.2.3.2 Autonomy of Educational Networks

A consequence of the constitutional freedom of education is the diversity of educational networks that exist. An educational network may come under the authority of the communities, province, municipalities, or other public institutions, as well as under the authority of private persons or associations. Traditionally, there have been three networks:

- *Community education*: These comprise schools that were originally set up by the state but are now the responsibility of the communities. The constitution states that community education must be neutral, meaning that the religious, philosophical, and ideological convictions of parents and pupils must be respected.
- *Subsidized publicly run schools*: These comprise municipal education organized by the municipalities and provincial education organized by the provincial administrations.
- *Subsidized privately run schools*: These provide education organized by a private person or private organization on private initiative. The governing body is often a nonprofit-making organization. Privately run education mainly consists of Catholic schools. Furthermore, Protestant, Jewish, Orthodox, and Islamic schools are also permitted. In addition to these denominational schools, there are also schools that are not affiliated to a particular religion. Examples of these are the Freinet schools, Montessori schools, and Steiner schools, which practice their particular educational methods and are also known as “method schools.”

Education organized for and by the government (community education and municipal and provincial education) is known as *publicly run education*; education provided by the third network is known as privately run education. In Wallonia privately run education is less common than in Flanders.

7.2.4 Funding the Education System

Since 1959, the basic principle has been that the state, and now the communities, must provide all funding (in the form of a block grant) for the schools within their jurisdiction. The grants issued to the subsidized networks are intended to cover teachers' salaries and the running, maintenance, and replacement costs of equipment and buildings. For several reasons, education in Belgium is not cheap. One of the main reasons is undoubtedly the freedom of education, which results in very dense school and discipline coverage, particularly in secondary and higher education. Different networks often offer the same discipline, and within the networks the coverage of disciplines is very similar. Controlling the education budget will remain a priority in the coming years.

7.2.5 Quality Development and Learning Targets

The Belgian education system employs a number of means, however, to achieve the best match between the intended and the implemented curriculum. Teachers are trained in the content-based and educational methods defined in the curriculum guidelines. Another means to help ensure the alignment of intended and actual educational practice is the development of instructional materials, including textbooks, instructional guides, and ministry notes that are tailored to the attainment targets. The implementation of the curriculum is monitored by the *school inspectorate*. The members of the inspectorate examine whether the attainment targets are being achieved and whether other organic obligations are being properly observed (e.g., the application of a timetable based on the core curriculum). The inspectorate is neither subject-based nor does it serve to control individual teachers. Instead, the entire school is to be monitored. It is responsible for all levels of education – from nursery schools through to higher education – and made up equally of members of state-run and private-maintained bodies. Educational advisors within the network are responsible for providing professional external support for schools and educational staff, especially in matters of general education and methodology.

In the long-term, *achievement targets* will replace curricula and specific syllabi, drawn up for each subject and school year. The minimum requirements set by the communities have to be documented and comprehensible to guarantee the quality of the education system and to legally safeguard maintaining bodies. This is why the concept of “achievement targets” has been introduced. Attainment targets are minimum objectives that the majority of pupils should achieve at a particular level in a particular discipline. They concern knowledge, attitudes, and skills and are both subject-related and cross-curricular.

Because curricula for primary school pupils are virtually identical, and because there are rarely more than two classes in any one particular year, there is no internal nor external differentiation. In secondary education, pupils change schools in line with their achievement and suitability to various education tracks.

In 95 % of schools, examinations and the transfer from one grade to the next are school-based. The award of certificates and qualifications, including those for university entrance, is also the sole responsibility of the schools themselves. The education system is very unusual in that there are no compulsory external examinations during either primary or secondary education. Each school organizes an autonomous examination for each subject in the curriculum, which is taken by all students every trimester or semester. During the year, results of formative tests that occur on an ongoing basis are used to determine the final assessment. The instruments used in testing are constructed by the teacher.

7.3 Overview of the Structure of the Education System

In Belgium there are three levels of education: primary (ISCED 0 + ISCED 1), secondary (ISCED 2 + ISCED 3), and tertiary (ISCED 5 and ISCED 6). Compulsory education lasts from the age of 6 to 18. Since the law of 29 June 1983, parents can also educate their child/children at home. Although there are a number of differences in the organization of the Dutch, French, and German education systems, these are in general rather small and mainly occur at the secondary level. In Wallonia, two types of secondary education, the comprehensive type 1 and the traditional type 2, still coexist, while in Flanders the unified secondary structure (a compromise between traditional and comprehensive education) was introduced in 1989. Belgian (in particular, Flemish) schools are either public, free schools (subsidized by the state and mainly Catholic) or maintained by private bodies (not subsidized).

7.3.1 Preschool and Primary Education

Preschool education is not compulsory but is attended by most children aged 2½–6 years; the primary sector (Years 1–6) caters for children aged 6–12. After completing Year 6, pupils receive a report reviewing the results of primary education. Primary schools usually work with the year/class system, whereby each group has its own class teacher, who does most of the teaching. Primary schools may employ a remedial teacher whose task consists in helping children with temporary learning or developmental difficulties.

7.3.2 Secondary Education in the Flemish Community

The various secondary schools provide general secondary education (ASO), technical secondary education (TSO), vocational secondary education (BSO), and secondary education in the arts (KSO).

English is offered from the second year of the ASO. Normally, a pupil can choose between the following disciplines: mathematics, Greek, Latin, and natural

sciences. In later years other disciplines are added such as business/commerce, humanities, and modern languages. Most Belgian pupils in Years 5 and 6 attending an ASO have at least one lesson of German per week, sometimes three. At KSO schools, most of which are only to be found in larger cities, pupils can choose between comic drawing and computer graphics, for example, in addition to more basic subjects such as English, French, and mathematics. A pupil gains the certificate of secondary education after successfully completing secondary education which provides access to higher education.

Secondary education applies to pupils aged between 12 and 18 years, attending Years 7–12. It lasts 6 years and is divided into three 2-year phases. The four types of education are as follows:

- *General secondary education*: The emphasis here is on broad general education, which in particular provides a firm foundation for entry to higher education.
- *Technical secondary education*: It emphasizes particularly general and technical theoretical subjects. After TSO, young people can take up a profession or go into higher education.
- *Secondary education in the arts*: Here, a broad general education is combined with active art education. After KSO, young people can take up a profession or go into higher education.
- *Vocational secondary education*: This is a practical type of education in which young people learn a specific vocation in addition to receiving general education. Under certain circumstances, pupils graduating from KSO can attend universities.

In the unified system, pupils' options are deferred to allow them to acquire a broad range of knowledge from as many subjects as possible. A great deal of importance is attached to this core curriculum. Part of the core curriculum is the same for all pupils in the same year. In addition, pupils can choose from a series of options. After Year 12, pupils can also opt for a seventh year (technical, artistic, and vocational) or for a fifth year after 4 years of vocational education.

7.3.3 Secondary Education in Wallonia and in the German Community

In Wallonia, so-called type 1 comprehensive education and type 2 traditional categorized education still coexist. Comprehensive education is by far the most common form in Wallonia. Only in Brussels are there still a number of schools that offer the traditional type 2.

The structure of type 1 education is as follows:

- Three cycles of 2 years:
- Cycle 1: the observation cycle
- Cycle 2: the orientation cycle

- Cycle 3: the determination cycle
- Four educational forms: general, technical, artistic, and vocational education.
- Two kinds of main tracks: transition and qualification (in both streams there are different study options).
- Specialization years: At the level of the second and the third cycle, specialization years are offered.

The structure of type 2 education is as follows:

- Two cycles of 3 years: a lower cycle and a higher cycle.
- Educational forms: general, technical, and vocational (only in the higher cycle).

In contrast to the comprehensive type of education, the type 2 pupil does not have the opportunity to put together her/his own study program. The determination of her/his educational form can also not be postponed, as she/he has to make her/his choice immediately after primary schooling.

7.3.4 Vocational Education

A certificate of secondary education is offered at all types of secondary school (general or vocational; where needed, a seventh year can be added). However, the vocation certificate of secondary education only entitles holders to study 3-year higher education programs.

Pupils who do not follow this line have the chance to pursue a dual-system vocational program. At the age of 15 or 16, they can choose a career program and receive theoretical training on 2 days in the week; on the other days, they work as an industrial apprentice in a company. A trainee mentor accompanies the young people during the whole program.

7.3.5 Part-Time Secondary Education

Alongside full-time education, there is also part-time secondary education. This form of education was introduced in 1983 together with the extension of compulsory school attendance from 16 to 18. These alternative forms of education are organized in part-time educational centers or in retail training centers.

7.3.6 Special Education

In the rather short international history of special education, Belgium has always been considered a pioneer. Since the eighteenth century, many legislative decisions have been made to provide appropriate education for special needs children. Special education is intended for children and adolescents who cannot attend

ordinary education due to temporary or permanent pedagogic needs. They require special assistance. Special education is adapted to the special needs of pupils with physical, sensory, psychological, or mental disabilities. The main aim is to integrate the pupils into the world of education on the one hand and into society on the other. A distinction is made between special preprimary education (from 2½ to 6 years of age), special primary education (from 6 to 13 years), and special secondary education (from 13 to 21 years). Primary and secondary special education is structured according to different types, which correspond to the pupils' needs (type 1, slight mental handicap; type 2, moderate or severe mental handicap; type 3, emotional disturbances; type 4, physical disability; type 5, protracted illness; type 6, visual deficiencies; type 7, hearing deficiencies; type 8, serious learning difficulties).

In special education, the evaluation is mainly formative. The class council and the guidance center decide on the composition of the classes. This also implies that they decide whether a pupil remains in the same group or moves to a higher class or to another educational form. During the lessons, pupils from different mentally or physically handicapped types can be grouped together. Each child receives individualized education, adapted to her/his specific needs. The four training programs provided by special education correspond to well-defined educational aims:

- Social training focusing on integration in a protected environment
- General and social training focusing on integration in a protected labor working situation
- Social and vocational training focusing on integration in a normal environment and work situation
- Training preparing for higher education and for integration into active life

About 4 % of the overall school population attended a special education facility in 1999/2000. The so-called integrated education of handicapped pupils in a regular school is also starting up. This integration is organized with the aid of experts in the domain of special education.

7.3.7 Higher Education

Tertiary education consists of *nonuniversity* education and *university* education. In the German community there are just two colleges of education and a college of nursing. In the French and Flemish communities, there are higher education facilities at three levels: universities with the right to award doctorates, facilities offering 4-year programs, and facilities offering 3-year programs. Transitions between the different levels in higher education are possible. In order to gain access to higher education, a student must possess a higher secondary education diploma, obtained upon completion of full secondary education (general, technical, and artistic) or of a seventh year in vocational education. There is no *numerus clausus*, but there are entrance examinations for students who wish to take a degree in higher education in nautical sciences, a

master's degree in particular artistic disciplines, or a university degree in civil engineering, civil engineering and architecture, dentistry, or medicine.

Students of higher education are assessed by means of an examination at the end of the year and an academic paper. Some subjects also provide for individual course assessments (especially practical work). At present there are some initiatives aimed at introducing some formative forms of assessment which would simplify the evaluation of learning achievement over the academic year. As mentioned above, although various universities have their own specific structures, aims, and methods, there are an increasing number of agreements between universities – both of the same type and of different types. This helps break through the more rigid, traditional structures between the various levels of higher education, thus generating greater permeability. Credits attained in nonuniversity tertiary education can thus be recognized in a transition to a university, releasing students from having to take some obligatory courses.

7.3.7.1 Higher Nonuniversity Education

Higher nonuniversity education includes a range of possibilities. They can be divided into eight main categories: technology, economics, social sciences, arts, health, agriculture, education, and nautical education. Both short-term (3 years of study) and long-term (4 or 5 years of study) programs are provided. Short-term higher education aims to enable students to acquire professional skills and to find a job upon completion of their training. Practical apprenticeships are also provided. Long-term higher education is “academic” education. Students are trained to apply the results of scientific research in the everyday reality of their occupations.

7.3.7.2 University Education

Belgium has 11 universities. These are active in the fields of academic education, research, and scientific activities in the interests of society. The universities inform the government about their achievements and policy options. There are six universities in Flanders and three in Wallonia. Academic education is based on basic research and contributes as a whole to general education, preparing the student to independently practice a scientific discipline or apply scientific knowledge. Students can enter into full-time or part-time university education. Universities can offer *basic courses* in 18 disciplines. The basic courses are divided into two cycles. The first cycle concludes with a candidate's first degree and lasts 2 years. For medical and veterinary courses, the first cycle lasts 3 years. The second cycle usually lasts 2 years. However, for some courses, the second cycle lasts 3 or even 4 years. Most courses conclude with a Licentiate's (master's) degree. In the light of the Bologna Process, the current structure will certainly be modified. In the meantime, the Bologna Process has largely harmonized programs at community and European level.

Advanced academic courses comprise supplementary courses and specialist courses. A supplementary course is aimed at supplementing or extending one or more academic courses in the second cycle. The course finishes with the academic degree in the supplementary field of study.

Academic teacher training concludes with a “qualification for upper secondary school teaching.” Students in the second cycle of a university basic course can receive this academic teacher training, but the “qualification for upper secondary school teaching” can only be awarded when the student has gained the degree for the second cycle.

A doctoral program is focused on the preparation of a doctoral thesis, but the academic title of “doctor” can only be awarded after a public defense of the thesis.

7.3.8 Adult Education

In the rapidly changing Belgian society, regular retraining and in-service education have become a necessity in all sectors. In addition, a number of students within the regular school system make study choices for which they are not suited. In later life, these groups are confronted with reduced opportunities on the labor market. Adult education is aimed at remedying this problem. The education departments therefore organize education for social advancement, part-time artistic education, distance learning, basic education, and second-chance education to cater to this need. Adult education is also organized by the Economics Department, Employment, and Home Affairs, as well as by the Welfare, Public Health, and Culture Department.

7.4 Developments in the Current School System

7.4.1 Preprimary Education

The first “nursery school” was opened in Brussels in 1827. During their first phase, the nursery schools were intended for children whose parents did not work at home. The primary concern was the child’s moral well-being and health. Later on, nursery education was considerably influenced by innovators such as Fröbel (Germany), Montessori (Italy), and Decroly (Belgium). Structurally, nursery and primary education function as separate entities, but the aim is to realize a fluent transition between the two educational levels. Although nursery education is not compulsory, the participation rate is extremely high: nearly all children (more than 95 %) are enrolled in the three learning groups (from two and a half to four, from four to five, and from five to six). Very few countries have such a high enrollment. Teaching is organized around “experience-related” education, meaning that the personal experiences of the child are the central focus. Self-realization is set as a target.

Most teachers are female and have completed a full-time, 3-year higher nonuniversity education. In-service training is offered by a variety of regional training centers. There are curricula for each year, even at preschool level. The general aims of nursery schools are:

- To promote a psychological and physical balance
- To develop mental faculties

- To develop reasonable understanding
- To develop harmony and versatility in the psychomotor domain
- To promote independence
- To promote creativity
- To encourage reasonable behavior in a community

The nursery school week consists of 28 units of 50 min 5 days a week. As in the primary school, the preschool year lasts 182 days: as a rule, a nursery school group consists of no more than 20 children taught in accordance to their age.

7.4.2 Starting School and Transition to the General Education School

In preschool education, pupils are mainly evaluated by observation. This kind of evaluation has a predictive function:

- Transition to the following phase of the nursery school or transition from the nursery school to the primary school.
- It also has an evaluative function: what does the child know in comparison with her/his peers?
- A diagnostic function (to understand why development is inhibited or why certain learning processes do not occur).

Parent can decide which school to send their children to, and schools are not allowed to reject certain children. This applies to Belgian children as well as for children not of Belgian citizenship. Lessons in primary schools take place in the mornings and afternoons (except for Wednesday afternoon) 5 days a week. The school year itself consists of at least 182 days. In the Flemish community, the school week comprises 28 lessons of 50 min. The school week for Years 1 to 4 in the French and German community comprises 28 lessons with 30 lessons in Years 5 and 6. In 1999, the pupil-teacher ratio in the Flemish community stood at 15.7:1 and in Wallonia at 14.2:1.

Mathematics, natural sciences and mother language lessons assume key importance. Together they amount to 70 % of the timetable for Years 1–4 and 50 % of the timetable for Years 5 and 6. Characteristic for Belgium is the teaching of the second official language (and in Wallonia German too) as early as Years 5 and 6. In some communities (Brussels and neighboring communities), second language teaching is obligatory from Year 3.

In the primary school the teacher has to develop tests which are given at the end of each learning phase to evaluate the realization of the educational objectives and to test the effectiveness of the learning process. A school report provides the pupils and their parents with a regular overview of the results, the progress made, the learning behavior, and the development of the personality of the pupil. Formative tests can be supplemented by more extended summative tests. In the Flemish community, the legislation on basic education obliges the primary schools to

provide a school plan (*schoolwerkplan*) reporting the evaluation procedures used in their pedagogical project. It is, however, imperative to pursue the officially stipulated final standards. The French Community is experimenting with a regulation to evaluate pupils every 2 years. This means that the transition from Year 1 to 2, from Year 3 to 4, and from Year 5 to 6 occurs automatically. After the completion of each cycle of two grades, the question is asked as to whether the pupil can transfer to the next cycle. By 2005 all schools should have implemented this reform.

In upper secondary education, a *class committee* decides whether or not a pupil has passed. In doing so, the class committee draws on a variety of sources, such as the pupil's previous and current performance in formative tests and information from the school advisory service, and invites parents and pupils for talks. The decision on progression to the next year (with or without restrictions) is contained in the orientation certificate each pupil receives at the end of each school year in secondary school.

7.4.3 Teacher and Head Teacher Education

A distinction is made between teachers employed on a "temporary basis" and "nominated" teachers. To be nominated, teachers must have senior status. There are three types of qualifications. Teachers are required to possess the necessary pedagogical diploma or, in the case of a teacher shortage, a diploma classified as providing a sufficient qualification. As a temporary measure in emergency situations, a third type of qualification can be accepted. Only the first two types of qualification mentioned above can lead to nomination. In Belgium teachers are trained on three educational levels:

- *University training*: In addition to their university diploma, university students can acquire a diploma in "aggregate secondary education." The first part of the program is a theoretical introduction. The second part provides a practical experience: the student observes a number of lessons in the class and also teaches under the supervision of a mentor. To obtain her/his diploma, the candidate is invited to present two (public) examination lessons. If she/he succeeds, she/he is qualified to teach at upper secondary education level (Years 10–12).
- *Full-time training in higher nonuniversity education (short type)*: In these institutes, teacher training is organized for preprimary (nursery) education, primary education, and the lower level of secondary education (Years 7–9). The students in this form of education choose one or two subjects for which they will be qualified. This 3-year training program is available to students with a diploma in secondary education.
- *Part-time training in pedagogical education for social advancement*: For teachers responsible for vocational practice (secondary education), and for teachers for whom no training program is available in higher nonuniversity education, specific training is provided in education for social advancement.

This is always a part-time program, organized in the evening or at weekends, and includes theoretical and practical parts. After passing a test, the candidates receive a Certificate of Pedagogical Competence, which allows them to teach technical courses in the lower and higher secondary grades of vocational, technical, and artistic education.

7.5 New Developments

7.5.1 The Teaching Profession Is Becoming Increasingly Less Attractive

Statistics already show that the teaching profession is becoming less and less attractive. Possible underlying factors are the longer duration of teacher training, the very long period of temporary appointment without a guarantee of nomination, the lower salaries (compared to the private sector), and the lack of social esteem attached to the teaching profession. The government aims to provide a sufficient number of competent and motivated teachers for schools in the short and the medium term. In this regard, short- and medium-term realization strategies have been developed. In order to remedy the teacher shortage in the *short term*, a number of new measures have been introduced since September 2000:

- In the future, it will be more rewarding for teachers to work overtime; there will also be a more flexible arrangement for returning to a job temporarily from leave or retirement.
- The teacher replacement pool creates a better status for supply teachers; the pool provides job security and a secure income in exchange for regional deployment to replace absent colleagues.
- Because of the enormous shortages on the labor market, a number of additional measures were recently taken, entering into effect from 2001.
- To provide additional support for teachers and school management teams from sectors where there are still sufficient reserves of labor
- To encourage students to opt for teacher training (this aim was promoted by means of a recruitment campaign in the media)
- To provide a premium for teachers who work in Brussels and who pass the language examination
- To introduce longer uninterrupted periods of teaching practice (2 months) for students in their last year of teacher training
- To draw up formulae to train (unemployed and employed) nursery teachers and physical education teachers to become primary teachers
- In order to make the teaching profession an attractive and valued job once again in the medium term, a coherent and coordinated action plan was introduced with various policy projects:
- Evaluation measures of teacher training have been conducted since 2000. Stakeholders are the users of teacher training, i.e., the clients and providers and other

experts. The result of this evaluation will indicate the line to be taken for the revision of initial training and in-service training.

- In 2000, the government concluded the Collective Employment Agreement V. This agreement places an emphasis on improving the working conditions of teaching staff and mainly consists of investments to improve working conditions with additional support and a reduction in planning load. Discussions in 2001 resulted in the Collective Employment Agreement VI, which applies to 2001 and 2002. In addition to a general salary increase, the CEA VI comprises a significant reduction in workload. With regard to salary conditions, the government has commissioned a study to compare teaching salaries with salaries in other sectors and in other countries and to determine the direction of the new salary policy for Flemish teachers. The social debate and the evaluation of teacher training will result in an overall idea of the teaching profession and related policy proposals.
- It is also envisaged to introduce a professional school administrative body. The Government of Flanders Act on the legal status of schools will be amended so that schools have the scope, instruments, and capacities to fulfill their role as employer as well as possible and to implement a personnel policy which develops, monitors, coaches, and values teachers.

7.5.2 Target-Group Policy

The Belgian government devotes particular attention to the educational problems of specific target groups. Therefore, different projects have been established in the last 10 years, both at and across specific educational levels. These projects differ markedly with regard to objectives, administrative management, and methods of funding, supervision, and monitoring. The educational priority projects (focusing on children with immigrant backgrounds in primary and secondary education) and the extended special needs provision projects (focusing on educationally deprived children in primary education) give schools an opportunity to apply for additional periods. Schools that are given additional periods can make use of different supportive measures. There are educational advisors across networks who can supervise schools. They usually work free of charge for the schools involved. In addition, schools in Brussels can apply for extra support for the implementation of educational priority and for the extension of special needs provision. Finally, there are a number of projects focusing on particular target groups. For example, there is a nursery class in Antwerp for the young children of bargemen, and a school network is being built up which these children can attend when they are traveling with their parents. In tertiary education, the government is subsidizing tertiary-level teacher training courses on certain issues (e.g., Islamic studies). A number of training courses are cooperating in a project aimed at promoting both the intake and the transfer of immigrant children. For non-Dutch-speaking newcomers, e.g., under the age of 18, reception classes are organized both in primary and secondary education. The quick acquisition of sufficient language skills (whether Dutch, French, or German) is central

to the successful participation of these children in the ordinary education system. Centers for adult education and centers for adult basic education organize courses in both Dutch and French as a foreign language for adults.

7.5.3 Information and Communications Technologies (ICT)

Since 1996, the government has implemented a policy of promoting ICT in education. It aims to encourage schools to integrate ICT in their lessons by means of information and awareness-raising campaigns, in-service training, subsidies for infrastructure, and project funding. Pupils learn what ICT is and how to use it while they acquire the content of various subjects and disciplines. The policy of promoting ICT is based on five strands:

- Providing the necessary basic infrastructure. The original aim was to provide one PC for every ten pupils by 2002 in the three highest years of primary education and in all the secondary years. In addition, the Federal Telecom Act ensured that schools have an opportunity to be connected to the Internet cheaply with broadband technology.
- In order to support schools in the introduction of ICT, various projects were set up. The publication of an ICT step-by-step plan should enable schools to draw up their own policy on ICT.
- Teachers need to be convinced of the added value of using ICT. They are also expected to be sufficiently competent in the field. Therefore, in terms of training, policymakers must work at two levels at the same time. First and foremost is the training of the next generation of teachers. Attention to the implementation of ICT in teacher training is a policy priority in the short and medium term. Secondly, it is necessary to work with the current generation of teachers by providing in-service training. In Flanders, there are currently five regional expertise networks that are actively involved in helping teachers to catch up by providing in-service training for ICT at the educational, technical, and organizational level.
- Many European countries are faced with similar needs and problems regarding the introduction of new media into education. Therefore, the establishment of a joint international platform where experiences can be exchanged and initiatives can be drawn up together was by no means an unnecessary luxury. The European School Network was established in 1998 as a framework for networking and for the exchange of information and projects.
- ICT policy must be underpinned by research and will have to be regularly evaluated. In December 2000, a 3-day ICT forum was organized in this context where teachers, school management teams, youth workers, industry, and policymakers scrutinized ICT policy. Following this forum, a new policy plan will be developed with new emphases, such as the expansion of the infrastructure programs, the improvement of ICT applications, attention to safe Internet use, the creation of a new educational portal site, etc.

7.5.4 Lifelong Learning

Learning is a process that encompasses a whole life span. The desire to learn can be stimulated by the government by providing learning contents and learning situations from primary to higher education that promote the skills for lifelong learning and make them useful for the future. Self-monitored learning and thinking in a problem-solving manner are skills that could be taught in the basic education of all young people. This process requires challenging attainment targets, sometimes across the different subjects, as well as basic skills. The centers for adult education are responsible for making lifelong learning for adults a real possibility. Continuing education is currently structured in a transparent way and follows on from secondary education. In the short term, it needs to determine how adult education can be made more attractive to skilled and experienced teachers. The creation of a complete electronic learning platform is another important element in facilitating lifelong learning for adults. The development of combined education in the centers for adult education also fits into this framework. Adults can also have learning experiences outside the formal education system, for example, during their work experience. This target has a place in a European perspective.

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K. Batarilo-Henschen (✉)

Georg-Eckert Institute for International Textbook Research, Braunschweig, Germany

V. Lenhart

University of Heidelberg, Heidelberg, Germany

8.1 History and Social Parameters of the Education System

8.1.1 Cornerstones of Historical Development

During the Antique period, the border between the Latin and Greek parts of the Roman Empire ran through the western part of the Balkan Peninsula. We can assume that the school system was not less well structured than in other parts of the Empire. However, mass migration brought about the collapse of the education system.

During the Ottoman Empire, there was no secular state education: schools were organized by individual religious communities. The first general education act for the Ottoman Empire came into force in 1869 as part of the Tanzimat reforms, “with non-Muslim subjects also being guaranteed the right to their own schools” (Mayer 1995, p. 48). As a consequence, the first secular schools for Muslims were established. The Orthodox Serbs in Bosnia and Herzegovina only had a few schools maintained by the church, and the school system for the Catholic population was in the hands of the Franciscans who maintained abbey schools in various cities.

The institutionalization of a modern education system in Bosnia and Herzegovina (BiH) goes back to Austro-Hungarian rule in the late nineteenth century.

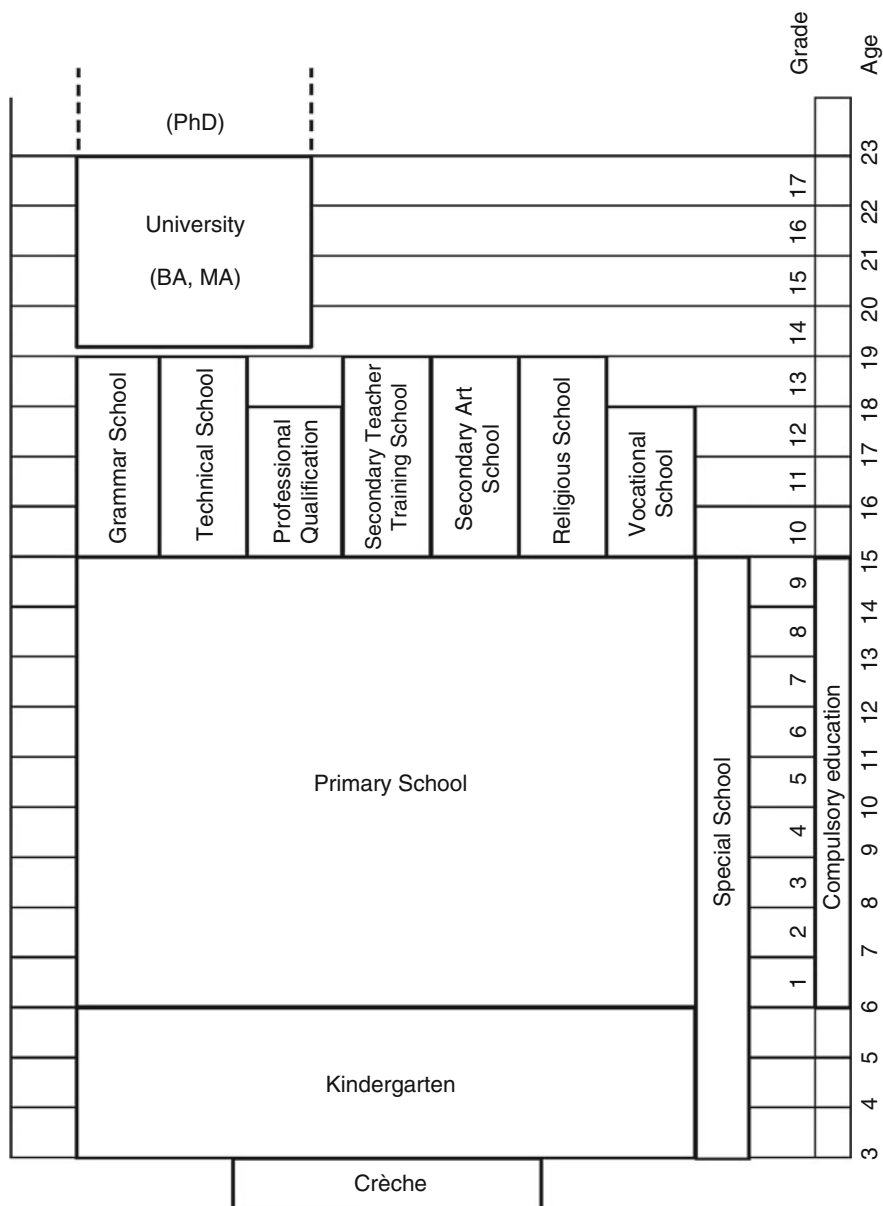
This structure persisted after the fall of the Habsburg monarchy in 1918 and the foundation of the Kingdom of the Serbs, Croats, and Slovenes, which lasted until World War II. At this time, Bosnia and Herzegovina was mainly populated by peasant farmers, and the rate of illiteracy of 70 % was correspondingly high. At the end of the 1920s, a number of education laws were passed, and there were various types of schools (*narodna škola, osnovna škola, realka, gimnazija*; Mayer 1995, p. 78).

When the second Yugoslavia was established in 1945, with Bosnia and Herzegovina as one of its six republics, educational reforms enjoyed high priority in rebuilding the country. The first reforms affected basic education that was extended from 4 to 8 years. This ran parallel to existing models of 4 and 6 years.

The General Law on Primary Education of 1958, however, made 8 years of primary school education compulsory for all republics (Dizdar 1996). The second comprehensive school reforms were ultimately implemented in the mid-1970s in Yugoslavia. In particular, secondary education was reformed, the federal Council for Science and Culture was disbanded, and responsibility for coordinating educational reform programs transferred to the inter-republic and interprovince commissions for educational transformation (Georgeoff 1982, p. 14).

Secondary school reforms (1975/1976 and 1986/1987) aimed at unifying secondary schools in Yugoslavia, making them more effective. The school reforms of the 1970s propagated the concept of “guided education” in the new uniform secondary school which aimed to overturn the traditional university orientation of secondary education. As a result, gymnasiums were abolished and manual apprenticeships promoted (Karge 2010).

Bosnia and Herzegovina



8.1.2 Key Reforms and Phases of Innovation

The Yugoslav Constitution of 1974, which significantly decentralized social and political life, affected education as well, particularly in terms of management

and financing, especially in the light of its focus on Marxism to serve the social and economic goals of Yugoslavia. In 1987, the first “all-Yugoslav” core curriculum was introduced (Perry 2003, p. 21). The improvement of the education system nearly resulted in the full enrolment of all children of primary school age. Before 1990, school governance, ownership, and administration, the structure of the school system, the curriculum, and teacher training in Bosnia and Herzegovina were not substantially different from that in the other republics of the former Federal Socialist Republic of Yugoslavia. At the end of the 1980s and the beginning of the 1990s, the education system was in a dreadful state, there was no budget for development, and teachers went on strike for the first time (Dizdar 1996). As a consequence, laws were passed and reforms introduced that however became meaningless when war broke out in 1992. In the war years from 1992 to 1995, education continued to function despite numerous victims, the destruction of schools, and teacher and pupils fleeing. The Ministry of Education in the Republic of Bosnia and Herzegovina passed provisions governing the work of the so-called war schools.¹ These included regulations marking the beginning of lessons and the transfer of responsibility for the safety of teachers and pupils to the local communities. When the work of these war schools commenced, pupil absences were recorded, excursions were made, and marks awarded. However, the provisions did not apply to the part-republic Republika Srpska established during the war.

The Dayton Agreement of 14 December 1995 marked the end of the war in Bosnia and Herzegovina and established the two entities which make up the State of Bosnia and Herzegovina, the Federation of Bosnia and Herzegovina (FBiH), and the Serbian republic, the Republika Srpska (RS). Whereas the Republika Srpska is centrally organized, the Bosniak-Croat Federation comprises ten cantons. This also has implications for educational matters: while the education system in the RS is centralized under the control of a single minister and guided by the Pedagogical Institute, the authority over educational issues in the Federation was delegated to the ten cantons and their respective ministries of education. The Federal Ministry of Education is solely responsible for coordinating the canton ministries. The Brčko District is an independent unit of the local self-government created on the territory of Bosnia and Herzegovina. The Department of Education is responsible for the education system in the Brčko District.

The international community is relatively influential in many aspects of the social and political life in Bosnia and Herzegovina: the Office of the High Representatives is the only authority with a mandate and responsibility for general government resolutions, and the responsibility for education has been in the hands of the OECD since 2002. Out of the unified and highly centralized prewar system have emerged three independent education systems, each of them with different school curricula, languages, and textbooks that have established them-

¹The provisions “The Government of Bosnia and Herzegovina – Instructions on adapting (the start of school) to the conditions during the time of war” and “Provisions to register pupils in primary and secondary schools and the beginning of lessons for 1992/903” appeared in the *Oslobodjenje* daily newspaper on 10 September 1992.

selves since the war (Lenhart 2000, p. 52). In the light of this, the sections below describe the areas of the education system for the Federation of Bosnia and Herzegovina and the Republika Srpska.

8.1.3 Political, Economic, and Cultural Framework for the Development of the Education System

Details of the ethnic composition of the population in Bosnia and Herzegovina draw on various local and international surveys: no national census has been taken since 1991.² The EU progress report from 2007 provided the following details: 44 % Bosnians, 31 % Serbs, 17 % Croatians, and 8 % others. The total population is estimated at 4.5 million (Hornstein-Tomić 2008). In view of the lack of details for the whole of the country, no information can be provided on the relationship between urban and rural populations.

Overall, the education system in Bosnia is heavily reliant on socioeconomic factors. On average, urban children attend school 2 years longer than children in rural areas.

Data³ available for preschool facilities and primary schools reveal a negative correlation between gender, regional background (town/country), and household income (OECD 2006).

Whether pupils continue school education beyond the period of compulsory schooling hinges largely on the family's ability to cover their proportion of the costs: expenses for secondary school education – transport, accommodation, textbooks, and meals – have risen drastically (World Bank 2007). Even the costs for textbooks and meals in primary schools have become prohibitive for some parental groups (the Roma minority and many families from rural regions).

In the light of the fact that many teachers left the country or changed their profession during or as a consequence of the war, numerous unqualified teachers have been employed. Today, these teachers have been integrated in the school system to such an extent that it is now problematic to introduce new teaching methods. In the Federation, teacher salaries vary from canton and region and are between 600 and 900 Bosnian convertible marks per month (300–360 euros); salaries are a little lower in the Republika Srpska, but in the Brčko District, teachers earn an average of 510 euros per month (March 2009). Salaries are roughly 100 euros per month higher in private schools than in state schools.

The relationship between family and school is somewhat ambivalent in Bosnia and Herzegovina: on the one hand, the inclusion of families in parent-teacher associations has increased participation; on the other hand, expectations – especially of low-education families – are hindering the continuation of school education at secondary level.

²The first census since 1991 is scheduled for the beginning of October 2013.

³On average, 4.3 % of all children attend a preschool facility, of which only 1.1 % come from poorer families and 5.6 % from more affluent families (OECD 2006, pp. 27–28).

8.2 Fundamentals, Organization, and Governance of the Education System

8.2.1 Current Political Guidelines and Goals in the Education System

In Bosnia and Herzegovina, educational goals have been defined in Articles 2 and 3 of the Framework Law of Primary and Secondary Education from 30 June 2003:

The purpose of education is to contribute, through optimum intellectual, physical, moral and social development of individuals, in line with their abilities and skills, to creation of a society based on the rule of law and respect for human rights, and to contribute to its economic development, which shall ensure the best living standards for all citizens.⁴

General goals are described in Article 3 of the Framework Law. Particular mention is made of the “development of awareness of belonging to the state of Bosnia and Herzegovina,” “encouraging of life-long learning,” and “the inclusion into the European integration process.”⁵

Within the scope of Bosnia and Herzegovina’s acceptance in the Council of Europe in 2002, the country made a number of concessions in education, the *Council of Europe post-accession commitments*. This obliged Bosnia and Herzegovina to push ahead with education reforms and to abolish any segregation and discrimination in education based on ethnic origin. In addition, Bosnia and Herzegovina ratified the Lisbon Convention of the European Council and UNESCO (OSCE 2005).

8.2.2 Basic Legal Principles and Management of the Education System

The constitution of Bosnia and Herzegovina does not contain any provisions governing the responsibility for the general governmental structure of education. However, the constitution does oblige the state to secure and protect people’s rights to education (Preliminarni 2005, p. 25).⁶ Moreover, the state is responsible for complying with international treaties that have been ratified. At a general governmental level, the Ministry for Civil Affairs is responsible for the vaguely defined supervision of the implementation of the framework law on education.

Education is the responsibility of the two entities: competence for education in the Federation of Bosnia and Herzegovina has been transferred to the cantons. At this level, the ten ministries of education and the seven Pedagogical Institutes are responsible for education. At the municipal level, school authorities make decisions on management and financial planning and appoint head teachers (Functional

⁴Okvirni zakon o osnovnom i srednjem obrazovanju u Bosni i Hercegovini, član 2.

⁵Article 3 of the Framework Law on Primary and Secondary Education.

⁶Articles 2 and 3 of the constitution of Bosnia and Herzegovina.

Review 2005, p. 26). There is also a Ministry of Education at the Federation level. This is however solely responsible for coordinating issues of textbooks and curricula, for example. The problem here is that the Federation Ministry of Education has only been able to exert influence on Bosnian-dominated cantons. The education system in the Republika Srpska is administered in a traditionally centralized structure in which the central ministry and its Pedagogical Institute are responsible for deciding educational priorities, passing the budget, supervising standards and the number of teachers through inspector and advisers, and controlling the implementation of the central curriculum. The responsibility for the education system in the Brčko District is in the hands of the Department of Education. This is responsible for implementing the legal provisions of the District and of Bosnia and Herzegovina and approves the curriculum proposed by the Education Council. Education inspectors provide schools with financial, technical, and personnel support. The Education Council is under the auspices of the Department of Education and supervises classroom work, the implementation of the curriculum, and the results of the work of teachers, pupils, and head teachers (Preliminarni 2005, p. 26).

In general, the education system in Bosnia and Herzegovina is highly fragmented. There are 13 education ministers, each with different competences and responsibilities. At the behest of the international community, a committee was brought together between 2002 and 2004 with the aim of better coordinating educational matters in the country. This coordination committee comprising all education ministers in Bosnia and Herzegovina and the head of the Department of Education in the Brčko District has an advisory function. However, meetings that have been held so far have proved unsuccessful (OSCE 2005). In June 2003, a conference of all ministers of education passed a Framework Law for Primary and Secondary Education in Bosnia and Herzegovina that came into force from July 2003 and/or the start of the school year 2003/2004. It was aimed at enabling the free movement of pupils in the whole country and promoting the recognition of school certificates. Other aspects of the law focused on increasing school autonomy, making school management more democratic, and increasing parent participation in the education process in the form of parent councils. The Framework Law set basic school education at 9 years and included the recognition of certificates as well as provisions for the inclusion of children with special needs in the regular school process (State Framework Law 2003).

Article 59 para 3 stipulates that, “All laws in the entities, cantons and the Brčko District of Bosnia and Herzegovina, as well as other appropriate regulations in the area of education, shall be harmonized with the provisions of this Law, no later than within 6 months from the effectiveness of this Law” (ibid). The harmonization envisaged in the law was never realized, neither in the passing of canton law nor at ordinance level. Only the Brčko District adapted its laws in the prescribed time. Some cantons found it extremely difficult to harmonize its own laws with those of the Framework Law. Thus, following political pressure and financial sanctions for the cantons of Central Bosnia and West Herzegovina, the High Representative introduced changes to the law and passed a law concerning primary and secondary education for Canton 10 (OSCE 2005, p. 6). It is interesting to note that this

intervention was not carried out by the State of Bosnia and Herzegovina as envisaged in Article 60 of the Framework Law but by the High Representative.

The Framework Law on Primary and Secondary Education provided the foundation for a framework curriculum that was approved on 8 August 2008 which aimed at adapting the three curricula already existing in the country. This framework curriculum came into force *de jure* from 2003 to 2004. Until this time, two curricula were applied in the Federation of Bosnia and Herzegovina and another in the Republika Srpska. Previous efforts to adapt curricula were unsuccessful: in September 2000, the education ministers signed an agreement which envisaged 70 % of the curriculum to be agreed nationally and 30 % locally (OECD 2003, p. 132). By 2003, however, this agreement had not been implemented. The common framework curricula and programs are based on a 9-year schooling and provide a binding structure for all curricula, enabling pupils throughout Bosnia and Herzegovina to share as much content as possible in lessons and easing migration within the country. In natural sciences and in mathematics, 80 % of the curriculum is common to all schools; in national subjects such as history and literature, 50 % is common. However, the common core curriculum still requires urgent development; otherwise, it will not do justice to the education of all pupils and will not ease the changing of schools (Pingel 2006, p. 530). The Agency for Curricula and Programmes is responsible for implementing and fostering common core curricula at all levels of school education. On the basis of an agreement between both entities, the Brčko District and the cantons, the Ministry for Civil Affairs was supposed to trigger the founding of the Agency. By 2005, this still had not happened.

8.2.3 Funding the Education System and Its Institutions

The political/territorial administrative structures in Bosnia and Herzegovina make it difficult to provide a precise analysis of the funding of the education system. With the exception of the Brčko District, administrative and financial responsibility for education does not fall under one single level of government. The national governmental level only makes minor contributions to funding education: only the Ministry for Civil Affairs finances the work of Bosnia and Herzegovina schools abroad in line with the provisions of the Framework Law on Primary and Secondary Education. In the Federation, the cantons and in some cases the municipalities are responsible for funding. In certain cantons, legislation envisages the funding of the costs of materials and transport (Preliminarni 2005, p. 70).

The Republika Srpska and the Federation of Bosnia and Herzegovina spend approximately 4 % and 6 % of their respective gross domestic products (GDPs) on education (Magill 2010, p. 24). The budget of the Federation's Ministry of Education, which increased by nearly 400 % between 2006 and 2008, covers the costs of the work of certain commissions and, since 2007/2008, some of the costs of textbooks (Federation Ministry 2008).

Education funding with the Republika Srpska is regulated in much the same way as in the Federation, but within a significantly more centralist system. In total,

2.83 % of the overall budget of the Republika Srpska is invested in education (Vlada Republika Srpska 2007, p. 31), and it is planned to maintain this level through to 2010. Municipalities assume the costs for material equipment for schools and for transport. The legal obligations of municipalities in respect of funding are greater in the Republika Srpska than in the Federation of Bosnia and Herzegovina. In the Brčko District, the Department of Education is responsible for preschool, primary, and secondary education. Funding is relatively centralized and supervised by the Department for Budgeting and Finance – 11.2 % of the District's overall budget is spent on education.

The increase in educational spending across all budgets in Bosnia and Herzegovina is slightly above the rate of growth in GDP, i.e., roughly 10 % in 1999 and 4 % between 2000 and 2004 (Preliminarni 2005, p. 72). This is partially due to the growth in the private education market which is neither part of public funding nor subject to financial supervision. As a result, there is little or no data on the financial situation of the private school sector. Parents share the costs of preschool education and the costs of textbooks and transport for older children.

The financing of the school system has depended on contributions from the international community. Education funding comes from the Council of Europe, the OSCE, and especially the Donor Coordination Forum (DCF)⁷ which rendered development aid and which contributed 9.1 million euros in 2007, for example, or 1.64 % of the total volume of official development aid (Magill 2010, p. 24).

8.2.4 Public and Private Schools

Private education in Bosnia and Herzegovina is growing, but there are differences in the various sectors of education. In terms of pure numbers, there are more private facilities in the preschool sector. The proportion of private primary and secondary schools is still relatively low, and most private schools are maintained by religious communities. However, the proportion of private tertiary institutions is quite high: besides the eight public universities in the country, there are 22 private institutes of higher education.

8.2.5 Quality Development and Support

The Agency for Standards and Assessment was founded in 2000 with the aim of setting and monitoring educational standards. This was succeeded in 2009 by the Agency for Preschool, Primary and Secondary School (headquartered in Mostar). The Agency defines achievement standards for pupils, assesses results, examines

⁷DCF donors active in the education sector in Bosnia and Herzegovina include: Austria/ADA, France, Germany/GTZ, Italy/IC, Norway, Spain/AECID, Sweden/Sida, the USA/USAID, the European Commission (EC), the United Nations Children's Fund (UNICEF), and the World Bank.

the state of reforms, consults the competent administrative bodies, and checks compliance with general educational standards in primary and secondary schools. Another key task of the Agency is in regard to the development of a common core curriculum for preschool, primary, and secondary education. The relevant department in Mostar is responsible for the development, monitoring, and progress of the core curriculum.⁸ This includes the stronger harmonization of educational standards across the whole of the country. To date, the Agency has only defined standards for the mother tongue subjects and for mathematics in Years 4 and 8 of the primary school (Čekrlja 2002, p. 2). In addition, the Agency runs courses and workshops for teachers and staff in public administration. In higher education, the Agency for the Development of Higher Education and Quality Assurance has been set up. Moreover, quality assurance at national and entity level has been regulated in Articles 49–53 of the Higher Education Framework Law (Functional Review 2005, p. 26).

Education inspectors bear the main responsibility for monitoring the administrative tasks of all educational facilities – from kindergartens to universities. These are civil servants employed by the Ministry of Education (except in the Brčko District and Una-Sana Canton) who represent the first line of control to assess compliance with educational law. In contrast to school supervision conducted by the Pedagogical Institute which evaluates and monitors lessons and preparation, the work of the education inspectors is focused on school administration: it assesses pupil IDs, licenses, the appointment of teachers, in-service training and certificates, disciplinary proceedings, and the appointment of head teachers or authorities (OSCE 2007a, p. 4). Teacher training is very theory laden and offers meager practical experience. Many faculties, with the exception of pedagogical academies, do not have enough staff to teach didactics (Muratović 2000, p. 19).

Schools, pedagogical academies, and university faculties run in-service training. However, given the tight restrictions, this is somewhat incomplete. After 1995, various international organizations took the initiative to improve in-service teacher training or ran courses themselves.

Preschool teachers are trained in the so-called teacher schools and in pedagogical academies. Primary school teachers for Years 1–4 are trained at teacher schools and at pedagogical academies where the training takes 2 or 4 years. Primary school teachers for Years 5–8 are trained at pedagogical academies. Secondary school teachers study a discipline at a university or at a music/art college with a parallel course in educational psychology. Special school teachers can study at the Faculty of Education and Rehabilitation at the University of Tuzla. In the 4-year course, special school teachers can specialize in seeing, hearing, or speaking. Teachers training for work in normal schools do not receive preservice or in-service training in dealing with children with special needs (OECD 2006).

⁸The background to this is the common core curriculum developed in 2003 following pressure from the international community, which serves as a common and binding basis for all curricula in the country, expanded to take account of regional and/or national ethnic cultures (Pinsel 2012, p. 354).

8.3 Overview of the Structure of the Education System

8.3.1 Preprimary Education

In both part-republics, preschool education falls within the responsibility of the municipalities' social services. Today, there is still no law governing preschool education at national level: this is still being coordinated. In the Republika Srpska, preschool education falls under the responsibility of the Ministry of Social Affairs and Education with the Ministry of Education holding responsibility in the Federation of Bosnia and Herzegovina.

Preschool institutions can take the form of baby care (jaslice) or kindergarten (dječiji vrtić) establishments. There are less than 200 kindergartens across the whole country attended by 4.5 % of a cohort. The Federation maintains 139 pre-school facilities in 2012/2013 which are attended by 10,179 children. In the Republika Srpska, 12 % of children under 6 years attended a preschool facility in 2005/2006 (Complementary Report 2004). Children from rural regions or small municipalities and children from poorer families are mostly excluded from pre-school education (OECS 2006). The dire conditions in kindergarten facilities are partially due to the inadequate legal situation, partially also due to the insufficient training and experience of people employed to administer and teach here. It is also worth mentioning the inefficient use of public money in this sector (Republički pedagoški zavod 2006, p. 3). Of the 8,438 children attending kindergartens in the Republika Srpska in 2005/2006, there were only 32 children with special needs. There is no information on the numbers of Roma children and children from national minorities.

8.3.2 Primary and Lower Secondary Education

Pursuant to the Framework Law for Primary and Secondary Education, the 9-year primary school was introduced in 2003/2004. Compulsory schooling thus starts at the age of six and continues to the age of 15 years. The Republika Srpska introduced the 9-year primary school in 2003/2004. This is a 3-level cycle system which takes the form of a class-teacher system in Years 1–3. Based on the national curriculum, the first cycle envisages the following subjects: Serbian (mother tongue), mathematics, natural and social studies, art, music, and sport. Here, subjects are introduced, providing pupils with options later along the core curriculum. These options will then play a role in vocational education and meet pupils' skills and aptitudes (Glavne promjene 2007).

In the Federation, the 9-year primary school was introduced in five cantons (Una-Sana, Tuzla, Zenica-Doboj, Sarajevo, and Podrinja) in 2005/2006 in all primary schools and in a part of the Herzegovina-Neretva Canton in schools with a Bosniak curriculum. Since 2006/2007, the 9-year primary school has been introduced in all parts of the country. However, unlike the triad system (3 + 3 + 3) evident in the Republika Srpska and in Bosniak cantons, cantons and schools with a Croatian curriculum follow a 1 + 4 + 4 structure.

The introduction of the 9-year primary school was not without its problems, especially concerning rooms, materials, and staff (Bosna i Hercegovina 2006). Financial reasons were mentioned in justifying the failure to implement the Framework Law's guidelines, insufficient numbers of children for Year 1, the lack of equipment in classrooms, and the absence of any core curriculum for Year 1. Teachers in the Republika Srpska often feel they lack the skills and are ill equipped to manage lessons in Year 1. Besides the Republika Srpska, only the Sarajevo Canton and the Brčko District introduced free textbooks for this school year. Other cantons taught this year are sometimes without any textbooks (OSCE 2005, p. 8).

In the *regular primary schools (redovne osnovne škole)*, the tasks defined in the curricula are implemented for all pupils. Some schools offer *tutorial classes* for weak students. In addition, special classes for gifted pupils and optional classes for pupils who express interest in extracurricular subjects are provided (Muratović 2000, p. 23). Leisure-time activities, programs on career opportunities, guidance and counseling, and social/cultural activities are also offered. Alongside special primary schools, there are "parallel primary schools." In this system, pupils simultaneously attend a music or ballet school (*baletske i glazbene škole*) and the regular primary school.

The subjects offered in primary school are the mother tongue, social studies (history and geography), mathematics, local history and general knowledge, arts, music, and sports. The focus is on foreign languages with three lessons per week – all other subjects have two lessons per week. A second foreign language is added from Year 3 and, depending on the school, additional religious education. Mother tongue instruction has four lessons per week in other primary school years.

The school organization in both part-republics is similar. The school year begins on the first Monday in September and lasts until mid-June, i.e., 35 weeks per year, 5 days per week. Lessons last 45 min, with breaks of 5–10 min. Schools often work on a shift basis, twice a day – sometimes three times per day. This hampers effective educational work, extracurricular activities, and any collaboration between schools and the community (Muratović 2000, p. 24).

Attendance varies between 93 % and 98 % for primary schools. However, the inclusion of children from vulnerable groups such as Roma, girls from rural areas, refugees, and returnees still remains a significant problem. Other difficulties in primary education concern the small size of schools, huge variations in teacher-pupil ratios, antiquated methods, and insufficient in-service training opportunities for teachers (OECD 2006).

In primary schools with a 9-year system, lower secondary education is divided into subjects taught within the same class for Years 4–6 and subjects taught by different teachers for Years 7–9. In schools organized along a 1 + 4 + 4 system, Years 6–9 represent the lower level of secondary education. A second foreign language, biology, physics, chemistry, history, and geography are added to the subjects taught in Years 1–4.

8.3.3 Special Schools

In Bosnia and Herzegovina, pupils with special needs are largely isolated from the school system. According to the National Human Development Report 2007, less than 1 % visit a regular school (OSCE 2007b). Children with particularly severe disabilities are educated at home or in special institutions and homes. Pupils with special needs are classified into various categories depending on the severity of their disabilities by the so-called defectologists and recommended for special schools or similar institutions. If there is no such institution close by – most institutions can be found in larger cities – it might well be that these children will never attend a school (OSCE 2007b). Most special needs pupils are educated in special schools, but there is a trend to include them in regular schools. This was officially anchored in the Framework Law for Primary and Secondary Education in 2002.

The city of Tuzla has the highest rate of pupils with special needs, some 9.3 %. In 2004, 469 of these pupils attended regular primary school, 181 attended secondary schools, but none was enrolled at a university (OECD 2006).

8.3.4 Upper Secondary School

Secondary education lasts 3 or 4 years depending on the type of school. In 2003, approximately 90 % of all pupils continued their studies at secondary level after successful completion of primary school.⁹ Of these, 80 % attended a type of vocational school and 20 % a general secondary school. About 60 % of those who attended a vocational school chose the 4-year technical school; the remaining 40 % attended a 3-year vocational college (OECD 2003). The law on secondary school education defined six types of schools of which five conduct entrance examinations:

1. The grammar schools (*gimnazija*) can be divided into general, classical, and language grammar schools. All gymnasium profiles are 4-year programs leading to university entrance qualifications. Subjects include mother tongue instruction, mathematics, physics, chemistry, biology, two foreign languages, history, geography, art, sport, and sociology. The largest proportion is taken up by mathematics and mother tongue instruction, each covering 105 h. In addition, electives such as democracy and human rights can be studied.
2. The technical school covers 4 years and allows pupils to specialize in such subjects as architecture, geology, and graphic arts while also taking courses in general subjects. The final qualification – the *matura* – taken after 4 years allows pupils to study at a university.

⁹Figures for the Federation of Bosnia and Herzegovina show that in 2012/2013, 109,090 pupils attended one of the various types of 214 secondary schools.

3. Secondary teacher training schools allow pupils to study at a pedagogical university or to work as a teacher. These schools only exist in parts of the Federation.
4. Secondary art schools provide a 4-year education in art, music, and/or ballet.
5. Religious schools are structured in a similar manner to grammar schools but with a special linguistic, theological, and philosophical orientation.
6. Within technical schools, there are numerous schools that offer a 3-year education with professional qualifications. The certificate gained at the end of the program does not entitle the pupil to study at a university (Russo 2000).
7. The majority of pupils (approximately 80 %) attend one of the 16 vocational schools that offer a total of 89 different programs. Graduation from such schools does not entitle pupils to study at a university.

Key reform programs in vocational education have been carried out by various international organizations, including the EU Phare VET programme (1998–2000), the EU Phare VET Bridging programme (2000–2001), the EC-TAER project (2001–2003), and the EU Phare VET programme (2002–2004) (Stoica 2003). The European Union Vocational Education and Training (EU VET) programme initiated in 2003 represents the start of a law unifying vocational training. The Framework Law for Primary and Secondary Education also contains provisions relating to vocational education (State Framework Law 2003). However, the fact that this has not yet been implemented is a problem for vocational education. There is still no system of coordination, no quality management, and no legal framework with binding standards. Original proposals envisage a special department for vocational education in the Agency for Standards and Assessment and in the Agency for Curricula and Programmes (EU VET Programme II 2005).

8.3.5 Postsecondary Education

Vocational schools also train adults in line with the curricula and methods of regular vocational education.

8.3.6 Tertiary Education

Higher education is the responsibility of the part-republics and, in the case of the Federation, the cantons. The Ministry for Civil Affairs has no influence whatsoever on higher education policies. In 2003, the Council of Ministers in Bosnia and Herzegovina was planning a framework law for higher education; in 2005, this was still in the process of being discussed. Since 2004, Bosnia and Herzegovina has eight state universities housing 65 faculties and 100,000 students. In addition, there are 22 private universities that are subject to the same laws as state facilities (Bologna Process National Report 2004–2005). The Higher Education Law in the

Republika Srpska from 19 July 2006 that came into force on 1 October 2007 regulates the work of universities in the Republic Srpska within the strategic goals of the Bologna Declaration of 1999.

The Bologna Agreement was ratified by Bosnia and Herzegovina on 19 September 2003 at the Minister Conference in Berlin. After nearly 4 years' consultation, the Higher Education Law was passed by the parliament on 31 July 2007 despite votes against the bill from the Croatian members (Parlamentarna Skupština 2007). Individual ministries in the Republika Srpska and some of the cantons in the Federation had voiced their opposition to the bill for a long time, fearing the transfer of power and responsibilities to the national Ministry of Education. Only following pressure from the international community – the OHR and the OECD – was the law approved. This was a precondition to advancing relations to the EU (OHR 2007). The Law proposes the 3-level system of degrees – bachelor, master, and doctorate – defines the descriptions of various forms of higher education in Bosnia and Herzegovina, determines institutional and academic autonomy, and allows for student codetermination at universities in the country. However, the students are not represented as an institution in the activities of the country's universities; their participation depends very much on the goodwill of the individual decision-making bodies. In particular, Articles 13–20 of the Framework Law on Higher Education regulate university autonomy and the integration of faculties as independent legal persons in a legal person of the university. However, to date, this has only been implemented at the Universities of Tuzla and Zenica (Tiplic and Welle-Strand 2006).

8.3.7 Adult Education

Adult education does exist in a general sense in Bosnia and Herzegovina but is not institutionalized. Most often, programs offer nonformal development and training courses in administration, management, health, sociopsychological fields, IT, and foreign languages. Adult education programs do appear to neglect continued training in the fields of sport, the environment, food and drink, and agriculture. In terms of formal education, two universities (Tuzla and Sarajevo) have established distance-learning centers. Before the 1992 war, there were only three centers for adult education in Bosnia and Herzegovina – in Goražde, Bihać, and Dobož. Today, employers prefer to train their employees in-house. One of the reasons for this is that certificates acquired externally are hardly recognized. Maintainers of training facilities are mainly connected to NGOs which are rarely involved to a sufficient extent in the whole training process (exceptions are perhaps in the fields of IT and foreign languages). Problems relating to adult education boil down to the absence of any law governing the continued education of adults; the quality of programs is not subject to any control process, the cooperation between the labor market and training bodies is poor, and there are not enough financial backers for adult continued education (Aladjuz 2007).

8.4 Developments in the Current School System

8.4.1 Transfer Between Schools

Once they have completed Year 9, pupils send their certificate, their marks from Years 5–7/8, and other documents to the secondary school the pupil wishes to attend next. These marks are converted to a 70-point system. In addition, entrance tests have to be taken that account for the remaining 30 points. These two elements provide a total point score which is used to classify pupils. Prior to enrolment, a minimum point threshold is defined for acceptance. This procedure of assessing the combination of certificate and entrance test is also used in the transfer from secondary school to university. Except when transferring to a secondary school specializing in medical professions, there are no entrance tests for pupils wishing to attend vocational schools. As part of the reform of the vocational education system, the transfer from vocational school to the labor market has taken on a new role. A strategy paper for 2007–2010 issued by the government of the Federation of Bosnia and Herzegovina highlights the orientation of education reforms “based on the needs of the domestic and international labor market.”¹⁰

8.4.2 Quality Assurance in Schools

School inspectors from the Pedagogical Institute are responsible for evaluating and inspecting schools in Bosnia and Herzegovina. Their tasks include securing and assessing the quality of schools. Traditionally, they regularly evaluate lessons and carry out formal controls of pupil numbers, teachers, regular classes, extracurricular activities, and annual planning. As part of a study¹¹ conducted by the Open Society Foundation in conjunction with the Pedagogical Institute, criticism was clearly expressed concerning the traditional work of the school inspectors. The criticism can be summarized as follows (PZ Kanton Tuzla 2003, S. 37/38): the evaluation solely refers to the visits announced in advance, but not to other activities such as the relationship between teachers, pupils, and parents or the work of pedagogical support staff; evaluated teaching staff only receive a mark as their assessment but are not consulted, and for teachers, it is not clear how they can improve on quality; there are no standards or instruments to establish an objective assessment; in only a few schools do pupils and parents have the chance to be evaluated internally; however, this has no weighting and does not have any impact on the quality development for the school; and head teachers are only poorly trained in matters that affect quality assurance, if at all. The study recommends the

¹⁰Bosnia and Herzegovina working program from the government of the Federation of Bosnia and Herzegovina 2007, p. 7.

¹¹cf. PZ Tuzla Canton and Open Society Fund Bosnia and Herzegovina: “Eksterna evaluacija skolskog nadzornika” (External Evaluation of School Inspectorate), 2003.

immediate reform of the work of the school inspection staff, with new strategies and standards for assessing the work of the school needing to be formulated. As a consequence of this study, a department for quality control and assessments has been set up in the Pedagogical Institute for the Tuzla Canton, supported by international NGOs. In other parts of Bosnia and Herzegovina, school inspectors still work in their traditional way.

8.4.3 Dealing with Special Problems

Returning pupils and teachers are an issue unique to the education system in Bosnia and Herzegovina. According to the UNHCR, there were still 200,000 refugees and returnees in 2005 of which 21 % were under 18 years of age. This situation requires needs to be treated sensitively, by the education system too (OECD 2006). In November 2002, the education ministers in Bosnia and Herzegovina signed an Interim Agreement on Accommodation of Special Needs and Rights of Returnee Children. Its aims included employing more returning teachers, providing instruction in the “national subjects,” adapting school committees to meet the nationality composition of pupils, banning insulting content from textbooks to end the bussing of pupils to mono-national schools, and creating facilities for returning pupils in the hometowns.

Between 2002/2003 and 2004/2005, the proportion of returning pupils in primary and secondary schools grew by 0.2 % in the Republika Srpska and by 1. % in the Federation of Bosnia and Herzegovina. The proportion of returning teachers was significantly lower in the Republika Srpska (2.56 %) than in the Federation of Bosnia and Herzegovina (7.0 %) (OECD 2006, p. 41). At the beginning of the school year 2003/2004, the competent ministries issued regulations instructing schools to establish committees in line with the national composition of the school’s pupils. Specifically, if more than 10 % of pupils and teachers belong to a “national minority,” school councils and boards should have at least one extra member (Odbor za koordinaciju provedbe privremenog sporazuma 2005, S. 4).

A further problem partially related to the situation of returning children is the high proportion of children who are either underachievers or who have never been to school at all. It is also difficult to capture the drop-out rate: there are simply no numbers and no system of recording and controlling school attendance. Pupils who leave school prematurely are more likely to come from poor family background; returning children and Roma children also tend to leave school early. This is due in part to the high costs of school books and transport and unacceptable living conditions. Another difficulty for returning children is the application of the so-called national curricula in the respective schools that do not necessarily correspond to the returning child’s ethnic background. Pupils that do not attend school are children from poor background, especially girls (17 % compared to 6 % nonattendance in the case of boys), children from rural regions, and Roma children. An estimated 70–80 % of Roma children do not attend school. Attendance in higher

years in primary school and in secondary school is even lower (OECD 2006, p. 41). The Tuzla Canton has the highest assumed rate of attendance among Roma children; however, it is estimated that here, only 20 % of children regularly attend school. Finally, another grave problem is the fact that there are no catch-up classes for early leavers or for children who have to repeat a year, and there is no effective system of reintroducing school leavers into regular school education (OECD 2007b, p. 16).

8.4.4 The Integration of Children from Ethnic Minorities

The education system in Bosnia and Herzegovina remains segregated with lessons based on different national curricula and languages. The ethnic division in the education system is primarily based on the three constituent nationalities, the Bosniaks, Serbs, and Croats, with all 17 official national minority groups being taken into consideration in the education system. As part of the Kaleidoscope project commissioned by the OSCE Mission for Bosnia and Herzegovina, a school and teacher manual was compiled that can be viewed as a contribution to the integration of minorities living in the country. Furthermore, the project included the training of nearly 700 teachers and educators, lessons and activities for thousands of pupils, as well as a nationwide school competition focusing on the heritage, the customer, and traditions of minorities (<http://www.oscebih.org/News.aspx?newsid=144%26lang=EN>).

Besides the Jews, the largest ethnic minority is the Roma culture. About 40,000 to 80,000 Roma live in Bosnia and Herzegovina, and they have the lowest school attendance rate of all national groups (US Department of State 2004–2005, p. 20). As part of the education reform strategy, an “Action Plan for the Needs of Roma and other Minorities in Bosnia and Herzegovina” was developed and in 2004 was approved by the Ministry of Education (OSCE 2004a). This action plan provides financial support for the acquisition of educational media, for transport, and for warm meals. Minority rights are included in Article 8 of the Framework Law and secure the integration of language and culture of major minorities in schools “to the largest extent viable.”

The constitution of Bosnia and Herzegovina does not make any mention of an official language. Official languages are determined at territorial/canton level in the respective constitution of the political entity. According to the constitution of the Federation of Bosnia and Herzegovina, official languages are Bosnian and Croatian in a Latin alphabet; the official language of the Republika Srpska is Serbian in the Cyrillic alphabet. Since 2001/2002, primary and secondary schools in both territories have to teach the Latin and Cyrillic alphabets. However, this regulation is still far from being fully implemented (Perry 2003, p. 35).

The Minority Law includes a provision allowing each ethnic group to freely choose the curriculum, providing that the minority has at least 20 pupils at the school from which a class can be formed (Central Bosnia Canton, Law on Primary Education, Article 5).

8.5 New Developments

After over 10 years of intensive international and national efforts to reform education, the education system still manifests numerous elements of ethnic segregation and discrimination. The complex political structures in the country, which are also reflected in the education system, are hampering reform efforts. Given the high level of fragmentation in the education system, there is no uniformity of educational laws and/or provisions. The fractionalization along ethnic criteria is not only very costly but also hinders any effective gathering of national data that would help facilitate the legal right for all children to gain free access to education (UN Human Rights Council 2008).

The most striking example of this segregation is the continued existence of “two schools under one roof” – in 2007, there were still 54 such schools in the cantons of Zenica-Doboj, Central Bosnia, and Herzegovina-Neretva. Initially, these schools were seen as a temporary solution to ease the return of families who were promised their own school with its own curricula and teachers by the international community. Here, individual school buildings accommodate two schools in which different groups of pupils are taught in accordance with varying curricula. In many of these schools, pupil and teachers of different ethnic origins hardly have any contact to each other. Pupils use separate entrances to the building and do not share the same break times, and even teachers do not meet in a common staff room.

In connection with this “two schools under one roof” phenomenon, there is also the issue of transporting pupils in mono-national schools across entity borders. Parents of refugee children have their children transported across regional borders to schools of their “own” ethnic group if the only alternative is assimilation in the nearest mono-national school with the curriculum of the local dominating ethnic group. In the immediate post-return period, many children were bussed to mono-national schools (in 2002, anything between 5,000 and 10,000 pupils crossed inter-entity borders every day). This number has dropped significantly since the Interim Agreement was passed, but children are still being bussed today. Parents are obviously afraid of the discrimination their children might suffer and prefer schools with a curriculum that takes account of their ethnic group above the quality of school education. There are some isolated examples of the reverse situation in which parents are swayed by the quality of education and enroll their children in schools in which another ethnic group prevails.¹² Nevertheless, the removal of discrimination and segregation along ethnic criteria remains an important task of educational reform in Bosnia and Herzegovina.

Efforts aiming at greater integration that have found their way in the education system show that progress is being made. These include the introduction of new subjects such as human rights and democracy which replaces civil defense, pilot

¹²Parents of pupils from Pale in the Republika Srpska send their children to the Catholic school center in Sarajevo despite the distances involved because of the school’s good reputation and quality (information from a conversation with the head teacher of the primary school at the Catholic school center 28 August 2009).

projects on the new subject “culture of religions,” and reforms in national subjects that include history, geography, mother tongue instruction, art, music, and religion. In history and geography, textbooks no longer contain negative stereotypes of other ethnic groups, for example. Following an intensive revision of school books that initially involved the international community blackening out¹³ passages of existing books under the protection of soldiers support from the international community has helped develop “Guidelines for Compiling and Assessing Textbooks for History and Geography.” By implementing these guidelines, a new generation of textbooks for Bosnia and Herzegovina is being developed. The initial results manifest an improvement in school books, especially in terms of methodology (Karge and Batarilo 2009).

Not only textbooks for history but also the curricula have changed and/or opened up: since 2012/2013, the war in Bosnia and Herzegovina (1992–1995) is now an official element of the curriculum in all parts of the country. While Serbian and Croatian textbooks continued to present a biased view of the war, the Bosniak history book between 2003 and 2011 left out the war completely or the chapter on the twentieth century ended with the political recognition of Bosnia and Herzegovina.¹⁴ Making a taboo of the war in lessons was a problem for pupils and teachers alike, especially as the issue was omnipresent in public, in family biographies, and in everyday life.

The different interpretations and imbalanced representations of the war in the three textbooks make it clear that teachers need to be supported by textbooks and training if they are to teach this difficult and sensitive issue of the war effectively. It is therefore essential to develop suitable education material and teaching concepts to deal with the conflict, especially when this sense of openness toward the subject is the first important step toward healing and reconciliation.

However, this progress and openness in history is have to face a retrograde step in textbook policy: since 2012/2013, the Federation of Bosnia and Herzegovina has been operating a “one book” policy, whereas in the past, several textbooks were approved for a particular subject. This gave teachers the option of adopting various approaches to suit their style of teaching. The accreditation of just one textbook is a problem in that it not only increases the vulnerability to corruption, it also significantly hampers the innovation and reorientation of potential authors.

In addition to changes in textbooks and curriculum policy with their focus on controversial issues, initial efforts have been taken to improve the general quality of education. At present, a major revision of the curriculum is being undertaken: in both the Republika Srpska and in the Federation, some syllabi from the war period

¹³The passages which could not be blackened out in time were marked with a stamp with the following formulation: “The following passage contains material of which the truth has not been established, or that may be offensive or misleading; the material is currently under review.”

¹⁴Nevertheless, in a Bosniak textbook by Muhamed Ganibegović (2006, *Historija-Povijest za 8. razred*), the final chapter on “Bosnia and Herzegovina as an Independent and Sovereign State” only describes the Bosniak population in terms of victims (civilians, Bosniaks) and perpetrators (mainly Serbs).

and/or from Yugoslavian times are being used. The new curricula focus of pupil skills and follow a global trend in educational politics.

In summary, it can be argued that education in Bosnia and Herzegovina is highly politicized. It could also be argued that the international community has “contributed” to this while at the same time providing unprecedented support to educational reform by offering numerous initiatives that aim to stabilize the country. Nevertheless, following many years of external intervention in the education sector, there are still many problems of separation in, and caused by, education that hinder the development of a tolerant, multiethnic society and represent a threat for the future. An appeal for the establishment of an education agency at national government level appears as urgent as ever before.¹⁵

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¹⁵There is no responsible Ministry of Education at national government level. Although the Ministry for Civil Affairs includes a section for education, it has not control functions whatsoever in the education system of Bosnia and Herzegovina.

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9.1 History and Social Parameters of the Education System

The country's education system was set up in the age of Bulgarian national renaissance in the nineteenth century, an age characterized by European democratic and humanistic values. It was radically transformed following 9 September 1944

P. Bachmaier (✉)
University of Vienna, Wien, Austria

The Law on National Education of 1948 created a uniform, national education system headed by the Ministry of National Education. Curricula were reformed founded on Marxist ideology and elevated to a “scientific philosophy”. Objectives targeted the “education of stalwart builders of socialism” implemented by uniform schools.

However, the destruction of Bulgarian traditions was never completed, and step by step from 1956, the education system has regained independence. In the 1960s and 1970s, the old cultural tradition was revitalized and elements of European educational models were integrated. In 1974 the then British minister of education, Margaret Thatcher, visited Bulgaria. Impressed by what she saw, she declared, “Bulgarians have two religions, orthodoxy and the education system.”

From 1975, Ljudmila Živkova, chair of the Committee of Culture, exerted considerable influence on the education system, which becomes stronger in 1980–1981 when she was appointed as head of the newly founded central Communist committee for education, science, and culture. On her initiative, aesthetic education gained prominence in schools and was supplemented by a national program for aesthetics in all aspects of society. This led to Bulgaria assuming a leading role among Comecon countries.

The Bulgarian Turks, an ethnic minority that accounts for roughly 8.5 % of the population, originally had their own school system. However, from 1958, this was gradually integrated in the general Bulgarian school system. Between 1984 and 1989, attempts were made to fully assimilate the minority by changing names.

In the course of its 45-year existence, the People’s Republic of Bulgaria has eradicated illiteracy and constantly increased the number of students, rising from 26,000 in 1944/1945 to 120,000 in 1988/1989. In comparison to other Comecon countries, Bulgaria was able to measure itself against leading nations at the end of the 1980s. With 124 students per 10,000 people, it was only second to the USSR.

Following the overthrow of Todor Živkov on 10 November 1989, effectively carried out by a group from the central committee of the Bulgarian Communist Party supported by the Soviets, there was a radical rethinking of the education system that aimed to denationalize the system and liberate it from ideology. The state’s monopoly of education was abolished, the Marxist educational goals and content were removed, and the new system democratically anchored in law.

The fundamental laws that have formed the legal framework for educational reform in Bulgaria since 1989 include:

- The Law on National Education, passed on 1 October 1991 under pressure from the Bulgarian Socialist Party (BSP) just a few days after its first reading in parliament against the will of the Union of Democratic Forces (SDS)
- The Law on Higher Education passed on 12 December 1995 and voted in by the BSP against the SDS
- The amendment to the Law on National Education enacted on 18 March 1998 with the votes of SDS against the will of the BSP

The “Support for East European Democracies Act” (SEED) program instigated by the US Congress in 1989 and administered by the US Agency for International Development (USAID) granted Bulgaria 290 million dollars by 1999. It focused primarily on supporting the market economy, providing humanitarian aid, and on the transfer toward a sustainable, democratic society. Significant influence was exerted by “Open Society,” a foundation established by US multimillionaire George Soros. Supported by the state Department, the foundation encouraged the younger generation to embrace Euro-Atlantic values.

The Union of Democratic Forces government under Ivan Kostov came to power in 1997 heralding a new, radical phase in educational politics. Whereas previous governments had tended to take a middle line, trying to blend old and new elements, also in education, the new government broke completely with the past, with the legacy of state socialism, turning instead exclusively to the West and the USA.

This has led to the introduction of market principles not only in economics but also in education. Local authorities have become responsible for maintaining public schools. Schools maintained by private bodies have also been allowed to develop, charging fees to enable them to offer better salaries to teachers. International schools maintained by Western organizations were also established. This Anglo-American model was introduced in the education system supported by financial instruments provided by the International Monetary Fund and the World Bank.

9.2 Fundamentals, Organization, and Governance of the Education System

9.2.1 Current Educational Policy and Goals of the Education System

The Laws on National Education from 1 October 1991 and 18 March 1998 gave all Bulgarian citizens a fundamental right to education, preparing individuals for responsible citizenship in a democratic society. With this goal in mind, education seeks to provide basic skills and general education for all citizens from the age of 6 to 16 years, to create strong ties between in-school instruction and preparation for life outside the classroom, and to encourage a sense of responsible citizenship and sensitivity to global issues. Educational reform has been based on the following principles:

- Guaranteeing a level playing field through the provision of general education, compulsory schooling, and secondary education for all citizens
- Free education at state-funded schools and local authority schools
- Coeducation for boys and girls
- Creating ties between general and vocational education and between theory and practice
- Effectively combining mandatory and elective subjects and combining, classwork, group work, and individual-based study

- Involving parents and the community in school activities
- Providing options for continued education without restrictions regarding age through various types of instruction and qualification

Given its legal basis, the aims of the present Bulgarian school system are to develop the intellectual potential of each and every pupil; to foster individuality, independence, and the desire for continued learning; to develop a national, cultural, and historical awareness; to guarantee general and vocational education; and to promote independent learning and the requirement to take part in public life conditioned by market economics.

9.2.2 Legal Framework

The legal framework of the education system is provided by the following laws: the Law on National Education (1991); the Amendment to the Law on National Education (1998); the Law on the Level of Education, the General Education Minimum, and the Curriculum (1999); the Ordinance No. 4 on the General Education Minimum and the Length of Lessons (1999); the Law on Vocational Education and Training (1999); Ordinance No. 2 on the Curriculum 2000; the National Programme on the Development of Pre-school Education and the Education System; and the Programme for the Development of Education, Science, and Youth Politics (2009–2013).

9.2.3 Governance of the Education System

Preschool education is managed by the state, the region (oblast), the municipality, and the school. Governance of the school system is performed at three levels: national, regional, and school. The following institutions are responsible for the governance processes of preprimary and school education:

- At national level – the Ministry of Education and Science
- At regional level – regional inspectorates of education
- At municipal level – educational departments of municipal administrations
- At school level – head teachers and relevant school councils

The Ministry of Education and Science (*ministerstvo na obrazovaniето i naukata*, MON) is a specialized body of the Councils of Ministers (the government) responsible for defining and implementing government policy in the field of education and science. The MON:

- Plans activities connected with the development of education in long-term programs, organizes and coordinates the work of the administrative units and educational institutions, and exercises control over the work of all types and levels of school and kindergarten in the country

- Participates in the formation of national strategy and priorities in the development of education and science
- Approves educational documentation and the educational network and supervises the introduction of innovations, the supply of textbooks and manuals, and teaching staff
- Conducts international activities in the field of education and science
- Defines uniform state educational standards
- Organizes publishing activities in the field of education
- Makes proposal and offers suggestions to the government on education and science financing
- Establishes, transforms, and closes state and municipal schools, and approves the establishment of private schools and kindergartens
- Appoints the heads of the inspectorates of education

9.2.4 Funding the Education System

The main source of education funding is the state budget. Each year the National Assembly (parliament) approves the government budget, which includes education funding. Education funds are sent to kindergartens and to about 90 % of schools (primary, basic, and secondary levels) via the local budgets of the municipal administrations. Thus, these institutions are called municipal schools. About 10 % of schools (special, vocational, and some subject-specific schools) are funded directly from the budget of the Ministry of Education and Science.

Private schools are funded by private associations, foundations, churches, and by international organizations. Expenditure on private educational facilities – kindergartens, schools, and universities – rose from 82 million € in 2000 to 230 million € in 2013.

9.2.5 Relationship Between the Public and Private Sectors

In addition to the institutions in the public sector, there were 532 private educational facilities in 2012/2013, of which 65 were kindergartens, 69 general and special schools, and 16 institutes of higher education (seven independent colleges and nine universities). In 2012/2013, 6,510 pupils attended general education private schools and 2,800 pupils vocational schools. In Varna, the second center of education in the country besides Sofia, there are 12 private educational facilities (kindergartens, primary schools, and middle schools), whereas there are only one to two private educational facilities in each of the other regional capitals.

The private German, American, British, and French schools – which are usually headed by Bulgarian citizens – work together with international partner schools and employ international teachers. The American College in Sofia, organized wholly in terms of an American model, was established by an American association in 1992.

German-speaking schooling has a strong tradition in Bulgaria. Besides the 23 German-language state schools that stem mainly from the era of state socialism, there are many other German facilities which are supported by the German Central Office for Schools Abroad.

The Law on Religions adopted in 2003 allows religious institutions to establish church schools and upper schools with the approval of the minister to meet their own needs within the framework of the Law on National Education (1991), provided that these schools offer a quality of education equivalent to normal state schools. The Bulgarian Orthodox Church has kindergartens, general education schools, and spiritual seminars in Samokov, Sofia, and Plovdiv as well as a theological faculty in Sofia. In addition, Sunday schools, organized in parish churches, offer religious instruction, choral music, and iconographic painting. The Islamic Chief Muftiate has three private Turkish-Muslim middle schools approved by the Ministry: the spiritual middle schools (*medrese njuvvab*) in Šumen, Ruse, and Momčilgrad. The Ministry does not recognize school groups (*Koran schools*) attached to the mosques as schools.

9.2.6 Quality Management

Preservice teacher training is performed at:

- Three-year teacher colleges, which prepare teachers for kindergartens, primary, and basic schools
- Faculties of education at universities, which prepare teachers for all levels of education – from kindergartens to gymnasiums – and for all school subjects
- Departments of education at technical, business, and other specialized universities, which prepare teachers mostly for vocational education

A total of 13 universities have faculties of education and they are the most popular source of teaching qualifications. There are twelve teacher-training colleges. College graduates usually continue their studies in part-time short-term programs at university faculties or departments of education leading to bachelor's or master's degrees. In-service qualification of teachers is organized at university faculties of education and institutes (three in number) for improving teacher qualifications.

9.3 Overview of the Structure of the Education System

9.3.1 Preprimary Education (*Detska Gradina*)

The objective of preprimary education is to provide an environment conducive to the development of the child's abilities and to offer instruction which will prepare the child for formal education. The children, who are aged three through to 7 years,

are usually divided into three groups. The pedagogical process in kindergartens is aimed at the emotional, moral, aesthetic, intellectual, and physical development of the children. Attendance at kindergarten is not compulsory, but about 40 % of all children go to preschool. The number of children in the groups varies from 12 to 22. The average number of children in a group is 20.6. There are also private kindergartens, which in most cases provide half-day care with an emphasis on foreign languages, arts, and music. They make up less than 5 % of the total. From 1990 to 2012, the number of kindergartens fell from 8,755 to 2,070 and the number of children from 304,000 to 208,000. The number of teachers also fell to 20,015. There are 65 private kindergartens, with 1,100 children and 5,200 teachers. The dramatic decline in public kindergartens is partly due to the fall in the birthrate, partly also to economic reasons.

9.3.2 Primary Education (Osnovno Učilište)

Primary education is provided at the primary phase of basic schools and at the primary phase of secondary general schools. The school year begins on 15 September. Children have 33 compulsory hours a week in Years 1 and 2 and 25 in Years 3 and 4. Free-elective hours (4 a week) are also included in the primary school curriculum. Curricula for free-elective hours are prepared by teachers and are approved by head teachers after consultation with parents and municipal representatives. The number of pupils per class varies from 16 to 28, with an average of 21. The teacher-pupil ratio is 1:17. From 1990/1991 to 2012/2013, the number of basic schools fell from 2,563 to 1,402 and the number of children from 342,000 to 252,372. The number of teachers also fell, from 21,459 to 14,224. There are 67 private schools with 2,011 pupils and 165 teachers.

Special interests of national minorities (especially the Turkish minority) are taken into consideration but restricted to lessons in their mother tongue (3 h per week) in Bulgarian schools. Article 8 of the Law on National Education (1991) states that “Students for whom the Bulgarian language is not their mother tongue, have the right to study their mother tongue in the public schools under the protection and control of the state.” The Council of Ministers resolved that the mother tongue can be taught as an elective 4 h per week in Years 3–8 at public schools. Following the political reforms of 1989, the government introduced Roma schools taught in the language of the Roma. However, these were not accepted by the Roma population and lessons are again given in Bulgarian.

9.3.3 Lower Secondary Education (Progimnazija)

The transition from the primary to lower secondary education – or the pro-gymnasium phase – follows after successful completion of Year 4. Pro-gymnasium education (Years 5 to 7–8) is provided at the pro-gymnasium phase of basic schools (osnovni učilišta) and at secondary general schools with

Years 5–12 (obštobrazovatelni učilišta). This phase comprises comprehensive instruction in all subjects of study and lays the foundations for studying the fundamentals of the different sciences. At the end of the school, pupils receive a school-leaving certificate. Pupils receive 30 compulsory hours a week in Years 5–8. The number of pupils per class varies from 14 to 27, with an average of 20.5. The teacher-pupil ratio is 1:11. From 1990/1991 to 2012/2013, the number of pro-gymnasiums fell from 2,263 to 1,729 and the number of children from 633,000 to 217,000. The number of teachers also fell, from 40,000 to 18,782.

9.3.4 Special Schools (Specialno Učilište)

Special schools provide education, training, and rehabilitation for children with physical, mental, and emotional disabilities. Most of the schools (67) are for children with mental disabilities. The majority of special schools (95) are basic schools (Years 1–8). The teacher-pupil ratio is 1: 6.7. The MON favors integrating some pupils with special needs into general education schools in the hope that these children can be more easily integrated into society. The Ministries of Health Care and of Education oversee the admission of pupils in special schools. Education and instruction in special schools is carried out according to government-set educational norms. The number of special schools fell from 138 in 1990/1991 to 72 in 2012/2013.

9.3.5 Upper Secondary Education (Obštobrazovatelno Sredno Učilište, Gimnazija)

Secondary general education is provided at secondary general schools with Years 1–12 and with Years 5–12 and at gymnasiums. The teacher-pupil ratio is 1:14. Almost all secondary general schools have subject-specific profiles in foreign languages, mathematics, chemistry, biology, or history. Transition to these classes occurs after Year 7 and proceeds on the basis of a national test and a subject exam. Subject-specific education lasts 5 years. Pupils obtain a basic general education in accordance with state educational standards. Pupils have 32 compulsory and four elective hours a week. Average class size is 22.5. The teacher-pupil ratio is 1:14. From 1990/1991 to 2012/2013, the number of gymnasiums fell from 160 to 140 and the number of pupils in upper secondary education (Years 9–13) from 392,000 to 135,000. The number of teachers remained relatively constant at 12,000.

Gymnasiums are specialized, subject-specific schools. Transition to them occurs after Year 7 and requires a national test and an entrance examination. Schooling at the gymnasium lasts 5 years. Pupils obtain education at a higher level in a given field – foreign languages, natural sciences and mathematics, humanities and classics, sport, etc. Foreign language gymnasiums are the most prestigious secondary schools in Bulgaria. The teacher-pupil ratio is 1:14. There are 35 Russian-language general education schools.

9.3.6 Postsecondary Educational Facilities (Profesionalno Učilište, Profesionalna Gimnazija)

The vocational education and training system comprises the following types of schools:

- Vocational gymnasium (profesionalna gimnazija), 4–6 years in duration, Years 8–9 to 12–13
- Vocational school (profesionalno uchilishte), 4 years in duration, Years 9–12
- Vocational centers (profesionalni centrove)

Pupils at vocational schools receive a general education and vocational training. Admission to the various types of vocational schools depends on school criteria. Admission to vocational gymnasiums occurs either after Year 7 or after Year 8. Entrance depends on passing admission examinations. The teacher-pupil ratio is 1:10. Admission to vocational schools occurs after Year 8 and no examinations are required. Training leads to a certificate in a given profession. The teacher-pupil ratio is 1:16. Vocational centers offer preparatory courses of different duration and subject profile.

As recommended by the European Commission, Bulgaria began reforming the vocational education system in 1995, joining the EU programs Leonardo da Vinci, Socrates, and Youth. In 2008, this led to the closure of 30 specialist technical schools that had a long tradition in Bulgaria.

From 1990/1991 to 2012/2013, the number of vocational gymnasiums (profesionalni gimnazii, until 2002/2003: teknikumi und sredni profesionalno-techničeski učilišta, SPTU) fell from 473 to 388. This was only partially compensated for by the 20 vocational centers (centrove za profesionalno obučenie, until 2002/2003: profesionalno-techničeski učilišta, PTU).

9.3.7 Tertiary Education (Visše Učilište, Kolež, Universitet)

Higher education comprises universities, academies, and colleges. As a whole, entrance to the most prestigious universities and the most desired specializations is subject to entrance examinations. Today, vice-chancellors are appointed by the minister. The introduction of the bachelor's degree in line with the Bologna process has effectively reduced university study to 3 years. Supervisory councils of universities also accommodate representatives from business, a trend that has strengthened the market orientation of the universities.

From 1990 to 2012, the number of institutes of higher education (universities, academies, and colleges) fell from 84 (including ten independent colleges, 31 colleges attached to universities, and 43 universities and academies) to 53 and the number of teachers from 23,663 to 22,672. In contrast, the number of students rose

from 188,000 to 283,000 (14,600 of which studied at colleges and 263,000 at universities). At the same time, the number of PhD students rose from 5,026 to 5,370. There are 16 private institutes of higher education (nine independent colleges and seven universities). From 2000/2001 to 2012/2013, the number of students at private universities rose from 27,916 to 49,741 with the number of teachers rising to 2,672 (533 at colleges and 2,140 at universities).

The most renowned international university is the American University in Blagoevgrad which opened in 1991 with the support of the Soros Foundation and today accommodates 1,000 students from 25 countries. International students, primarily from the Balkans, make up about one-third of all students. There are about 70 professors and lecturers, usually on short-term assignment. There are also Bulgarian lecturers and their numbers are continually growing. In 1990, a faculty was established for German engineers and students of business administration at the Technical University of Sofia. The aim of the faculty is to train managers at university level. The faculty works closely with institutions from Karlsruhe, Magdeburg, Brunswick, and Essen. The Islamic University in Sofia, which is subordinated to the Grand Muftiate, provides a higher level of education over 3 years for hodjas, but does not count as part of the Bulgarian system of higher education. Professors and teaching materials come from Turkey.

9.4 Developments in the Current School System

When the Union of Democratic Forces took over power in 1997, there was a parallel reform in the content of the education system. A law on changes in the curriculum adopted in 1999 aimed at bringing the education system closer to Western standards. Bulgarian literature no longer held privilege over others and has since been treated as part of world literature. History also lost some of its significance and has since been treated as part of world history. The Open Society foundation funded new textbooks, in particular in social sciences. This was justified on the grounds that openness to more global values had reduced the dependency on Bulgarian literature classics and Bulgarian history.

Foreign languages have gained in importance significantly. Lessons have been mandatory since 2000/2001. The EU has recognized the equivalence of Bulgarian secondary school certificates. As part of this, obligatory matriculation examinations were introduced in accordance with the Amendment Law on the Law on National Education (1998). In 2008, a nationwide uniform matura was conducted for the first time with standardized questions.

The extracurricular activity of the institutions within the education system and the education of secondary school pupils that were important during the time of state socialism were abolished. However since then, young people have been put at risk with the first signs of alcoholism, drug addiction, and prostitution and the absence of any meaningful perspectives for leisure time activities now appearing.

The EU treaty with Bulgaria that came into force on 1 January 2007 when the country joined the Union regulated the education system and vocational education in law. This principally defined:

- The country's participation in the European education programs Leonardo da Vinci, Socrates, and Youth, which are the EU's main instruments for putting the integration between member states into practice
- The development of the European dimension in higher education based on the Bologna Declaration (1999)
- The development of a system of lifelong learning and continued education, aligned toward the goals of the Lisbon Strategy (2000)

Since the political turnaround of 1989, the Bulgarian education system has been suffering from negative demographic trends. From 1989 to 2012, the population shrunk from 8.9 to 6.9 million people, attributable in part to the fall in the birthrate from 1.8 to 1.4 and to the high level of emigration of highly qualified younger people. The proportion of adolescents below the age to work has fallen from 21.6 % to 14.5 %, and the number of pupils who fail to complete the basic school, the pro-gymnasium, the general education secondary school, or technical college has risen dramatically. Attendance at school is deteriorating and many children leave school early.

According to the information provided by school inspectors, about 20,000 of the 960,000 registered pupils dropped out of school in 2012/2013. About 100,000 children do not go to school at all. About one-quarter of pupils in compulsory schooling do not complete the last year of their school education. Teacher salaries are so low that they are forced to give private extra lessons to prepare pupils for an entrance examination at an elite school or at a university or to take on a second job. The current reform in the education system has led to Bulgaria falling from third place in tests of natural sciences to 42nd in the last study in 2007 in which 57 nations took part.

9.5 New Developments

The neoliberal model that has determined the education system since the political reform in 1989, and especially since the "blue revolution" on 1997, has been thrown into a crisis. A growing number of educationalists and intellectuals are questioning whether denationalization, decentralization, autonomy, and a market orientation of schools might be the solution to the problem. The liberal education reform has led to an ever-increasing gap between the losers of the reform – the majority of the population and the impoverished middle classes – on the one hand and the winner on the other hand, those who can send their children to urban elite schools and private colleges. Therefore, many schools are turning their backs on extreme liberalism and classes and are beginning to see a return toward greater discipline. In some case, poor behavior can lead to marks being reduced by 25 %.

The following issues are currently dominating discussions on education:

- Reducing the education budget: the overall expenditure on education fell from 4 % of GDP in 2009 to 3.5 % in 2013, or roughly 10 % of the national budget today. For the school system alone, Bulgaria spent 1.76 % of GDP, far below the EU average of 2.41 %. On a percentage basis, Bulgaria is therefore spending less than all other EU countries for its education system.
- Fall in pupil numbers: from 1990/1991 to 2012/2013, the number of pupils across all types of school fell from 1,950,000 to 758,000, i.e., by more than 10,000 per year. This trend is reflected in the drop in the numbers of schools and teachers.
- Discrepancy between the wishes of the government to expand the vocational sector and the opportunities these schools present in terms of equipment and material assets.
- The planned eradication of marks in the basic school in a new education bill.
- Increasing unemployment among teachers and the absence of any program to provide professional alternatives.
- Separating secondary education from a higher education that demands its own entrance examination.

The “Movement for the Defence of Science and the Education System,” a grassroots movement of university instructors born out of a strike in autumn 2007, is highly critical of current education politics and is demanding that the education system become a national priority.

On 29 May 2013, the European Commission issued a recommendation on Bulgaria’s national reform program 2012 and delivered an opinion of Bulgaria’s convergence program for 2012–2016, demanding a further alignment toward the Western education system: “Bulgaria is facing the challenge of improving the overall quality and efficiency of its education system. The final adoption of the School Education Act before the end of 2013 would provide a framework for progress on the necessary reforms, including modernising curricula and implementing improvements to teachers’ training and incentives. In higher education, reforms have made very limited progress. The existence of an important disparity between higher education outcomes and labour market demand worsens structural unemployment and hampers the development of high-value, innovative sectors. The poor performance of higher education is linked to a lack of incentives at institutional level as well as to the standard of individual researchers and teachers.” Subsequent to this recommendation, Minister President Plamen Orešarski who formed a new government following early general elections declared: “We have to build up an education system that better matches the labour market.” And the new education Minister Anelia Klisarova explained: “Vocational education is our priority and textbooks have to be coordinated in line with business.”

In all government declarations since 1989, the education system has been described as one of the decisive factors in a strategy to rebuild Bulgaria and a key mechanism in the development of Bulgarian society and culture. However,

since the political reform of 1989, international financial institutions have actually recommended cutting expenditure on education and transferring the maintenance of schools to the municipalities, which were less able to do so.

In view of the crisis in society, Bulgaria should not rush to throw its own educational tradition dating from the time of national renaissance in the nineteenth century overboard as redundant ballast as it did at the end of the 1940s. Instead, it should retain key elements of it, those that were marked by the enlightenment and humanistic education, and find syntheses to cope with the tasks of the twenty-first century.

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The chapter below reflects developments up to 2010.

M. Palekčić (✉) • I. Radeka
University of Zagreb, Zagreb, Croatia

N. Zekanović
Croatian Ministry of Education and Sport, Zadar, Croatia

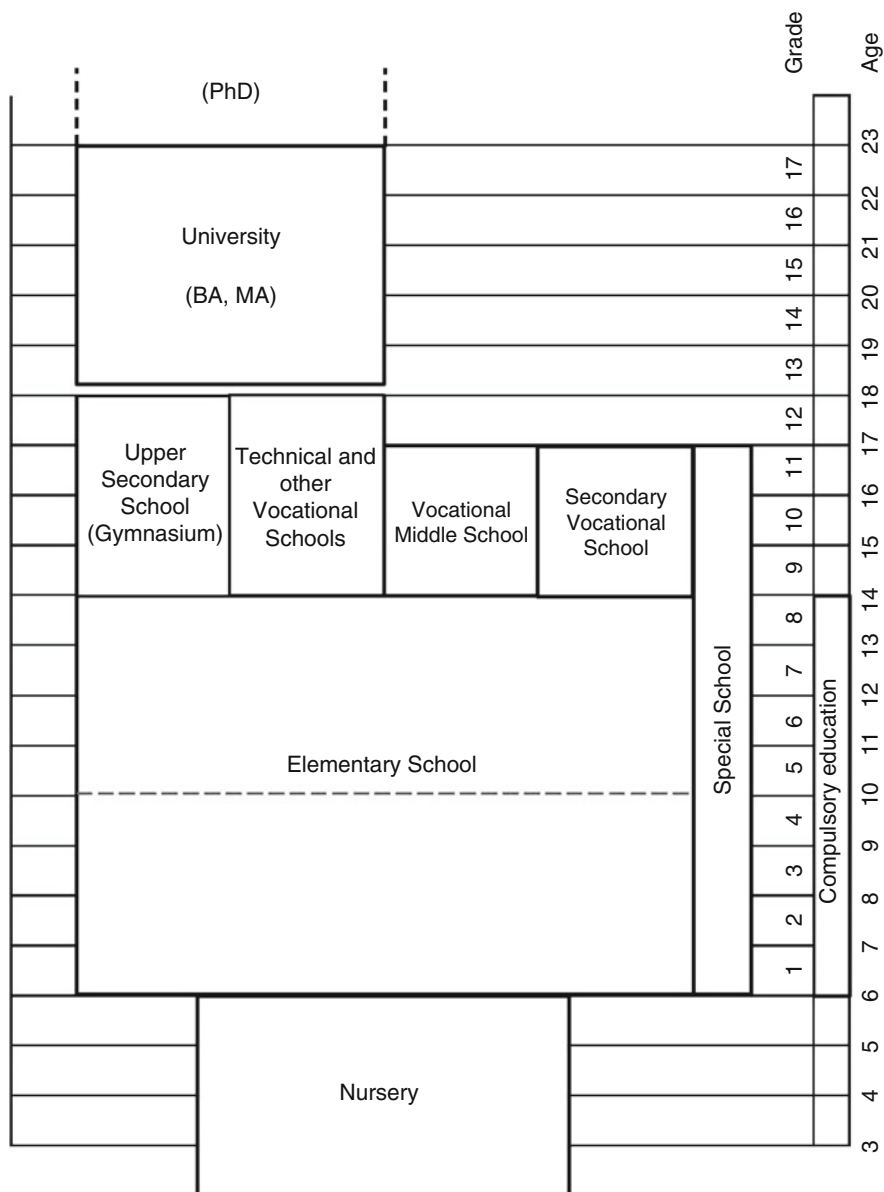
10.1 History and Social Parameters of the Education System

10.1.1 Cornerstones of Historical Developments

The earliest recorded information on educational institutions in Croatia dates from the fourteenth century and refers to village schools associated with churches. In the following centuries, Austrian and Hungarian rulers encouraged reform movements which favorably affected the entire Croatian school system. However, as there was a shortage of qualified Croatian teachers and of officially approved textbooks in the Croatian language, it cannot be considered genuinely Croatian. It was not until the second half of the nineteenth century that the school system developed into a truly Croatian system. Only after the collapse of absolutist rule and the settlement between Croatia and Hungary within the Austro-Hungarian Empire in 1868 was Croatian introduced as the language of instruction in educational institutions. The reform movement, initiated by progressive teachers, culminated in the publication of pedagogic writings, the foundation of numerous teachers' associations, which were assimilated into the umbrella organization of the Croatian Pedagogic-Literary Association in 1871 and the organization of three great teachers' conferences. The first national law regulating primary education and teacher training (the Act on the Establishment of Primary Schools and Teacher Training Institutions for Primary School Teachers in the Kingdom of Croatia and Slavonia, enacted by the Croatian Parliament on 31 August 1874) prepared the ground for the establishment of primary schools in Croatia. In the same year, the Croatian University at Zagreb commenced teaching and research. Ever since, Croatia has maintained a high level of autonomy with regard to its national school system.

Against the background of the kingdom that embraced Serbs, Croats, and Slovenes after the First World War, the school system was centralized; however, the individual countries (*banate*) retained the authority to decide on specific questions of implementation. While the foundations for a unified school system had been laid down in 1926, it was only in 1929 that a national curriculum was settled; 8 years of compulsory, including pre-primary, education was introduced, and both secondary and tertiary education were regulated by law. In the years following 1929, the individual schools' autonomy became increasingly restricted. After 1945, the Croatian Republic in general, and its education system in particular, was adapted to the new social and political order of the Yugoslavian Federation. Primary education was made compulsory for 8 years in 1952. The reform of the school system that took place at that time lasted for 20 years. The significance of non-vocational secondary school as the dominant type of general school increased greatly. Teacher training courses now took 5 years; at the same time, a network of both 4-year technical and 2- or 3-year vocational colleges was established. The General School Act of 1958 formed the basis for Croatian special legislation with regard to educational policies; Croatia was thus granted a high degree of autonomy within the framework of the ideological and political principles of the socialist order.

Croatia



In the 1960s, both the organizational structures and the contents of the school system were unified and to some degree decentralized. The “second school reform” of the mid-1970s was implemented by means of closer pragmatic cooperation between schools as “service providers” and commercial companies as “customers.”

As a consequence, a form of “anti-intellectualism” emerged; non-vocational secondary schools were formally abolished. At the same time, this advance was an attempt to extend general compulsory education to 10 years. Because of both inconsistencies within the program of reform and a lack of funding, however, this effort was doomed to failure. The legitimate criticism of the second school reform resulted in further attempts at restructuring the school system, especially in the middle schools (upper level of secondary education), between 1986 and 1990. The “Croatian National War” delayed but did not prevent the emergence of a Croatian school system based on a democratic system after 1991.

10.1.2 Political and Cultural Conditions of the Education System

The majority of the Croatian population lives in larger towns/cities or in larger residential estates, while numbers living in villages are constantly falling. As a consequence pupil numbers in these rural areas have dropped dramatically. This is especially true for higher mountainous regions and the Adriatic islands.

All Croatian citizens are entitled to education irrespective of their ethnic background. Pre-primary education is guaranteed by law for a certain number of children; all children, furthermore, have the right to primary and secondary education. National minorities are partially instructed in their mother tongues or can attend schools for national minorities. In 2007/2008, 10,037 children of ethnic minorities (Italian, Czech, Hungarian, Serbian, Slovaks, Macedonian, German, Austrian, Ukrainian, and Ruthenes) were taught in their respective mother tongue in a total of 163 educational facilities (day-care centers, primary and secondary schools). In total they constitute about 1.7 % of all pupils. In recent years, considerable funds have been provided for schoolrooms as well as for the training of qualified teaching staff.

The problem of war refugees who do not want to return to their former places of residence is still topical in some regions; its significance, however, is decreasing.

Generally, Croatian teachers are not content with their social status. In recent years, they have succeeded in improving their situation; they have achieved, for instance, pay rises and additional financial bonuses. Teachers’ dissatisfaction has been especially caused by the fact that their salaries are lower than those of other employees in the public sector and in administration. Salaries of primary and secondary school teachers, on the other hand, depend on both the qualifications and the position of the individual teacher. Middle school teachers receive a net salary of approximately 600 euros in their first post; by the end of their professional lives, this figure will have increased by 25–50 %. Teachers usually work until the age of 65. In tertiary education, salaries are paid according to academic title and professional position and vary between 700 euros and 1,400 euros. The gravest problem for Croatian employees in general, and teachers in particular, is the very low pension; even after 40 years of service, monthly net payments do not exceed 500 euros. In 2012, teacher salaries are expected to increase by around 60 %.

10.2 Fundamentals, Organization, and Governance of the Education System

10.2.1 Legal Foundations and Administrative Hierarchies

According to the Constitution of the Croatian Republic, primary school is obligatory and free of charge, while education at secondary and tertiary level is open to everybody in accordance with their abilities. The Constitutional Act on Human Rights and Liberties and Rights of Ethnic and National Groups or Minorities in the Croatian Republic contains special regulations for minorities. Preschool education is regulated by the Pre-school Education Act (1997) and the primary school and secondary education by appropriate legislation from 2008. The Adult Education Act was passed in 2007, while the Scientific Activity and Higher Education Act (2003–2006) governs tertiary education.

10.2.2 Governance

The educational sector comprises four levels of control: (a) the Croatian Republic, (b) administratively autonomous regional entities (*županije* and the city of Zagreb), (c) local entities (municipalities and towns), and (d) legal entities as well as individuals both Croatian and foreign. The latter include churches and religious communities.

At the level of the state, the Ministry of Science, Education, and Sport (hereinafter Ministry of Education) controls the operations of the school system. The ministry passes regulations regarding the implementation of laws, approves the establishment of schools up to the secondary level, and decides individual administrative cases. Two committees within the ministry supervise the performance of head teachers. An inspectorate (*prosvjetna inspekcija*) controls the legality of operations in every school at both the institutional and the individual levels and also inspects working places. Educational supervision in schools and adult education is the responsibility of the three agencies for educational structure, teacher training, and adult education (*Agencija za odgoj i obrazovanje, strukovno obrazovanje, obrazovanje odraslih*). They determine and implement annual curricula, organize classes and other educational units, and plan the adequate use of textbooks, teaching aids, and other media. Compliance with and implementation of pedagogic and didactic standards and the regularity of examinations and qualifications are also monitored. The National Centre for External Evaluation (*Nacionalni centar za vanjsko vrednovanje*) assesses academic achievement in primary and secondary schools and also conducts school examinations (planned from 2010). The Agency for Tertiary Education (*Agencija za visoko obrazovanje*) supervises higher education. Finally, administrative control is exerted by regional bodies, which have jurisdiction over districts.

Individual schools are responsible for the implementation of curricula and school programs and for the adequate distribution of the funds available. Administrative committees, comprising representatives of teachers, the inspectorate, and parents, decide on and control the implementation of annual curricula and school programs at every individual school. In order to facilitate pedagogic supervision and decision-making, the teaching staffs have initiated school and class committees. In addition, each school has parents' and pupils' councils. National educational standards for preschool, primary, and secondary education were introduced in 2008. These are to be fully implemented by 2022.

10.2.3 Funding

Approximately 3.2 % of the Croatian gross national product is spent on the school system. The Croatian national budget covers a small proportion of preschool programs, about 80 % of the cost of primary and middle schools and most of the expenses for tertiary education. The costs of preschool education are borne by the communities and municipalities. Parents contribute to the costs incurred in maintaining day-care centers (here there are regional differences). They also contribute financially to the costs of additional learning materials in primary school and the first 2 years of secondary school, paying for all textbooks in the last 2 years of secondary school and to the costs of university study (amounts here depend on the achievements of the students). The state and the universities award scholarships to students of outstanding ability; in addition the economic background of families is taken into account to ensure that students from low-income families have access to education.

The Ministry of Education issues documents which regulate educational structures and contents for all school levels. The preschool program was published in 1991, curricula and programs for primary schools from 1992 to 1999, and for middle schools (upper level of secondary education) between 1992 and 2006. These documents delineate contents and the total number of both obligatory and optional lessons that pupils have to take per week; furthermore, the distribution of subjects over the school years is laid down. Depending on the school level, didactic standards, staffing levels, structural conditions, and the implementation of programs are outlined. In contrast, curricula for vocational secondary schools that offer general as well as practical instruction are issued by the Ministry of Trade. Within the Ministry of Education, specific committees develop curricula and school programs; they are issued only after a public debate. These curricula and programs are a means of controlling both learning and the teaching processes. Schools and teachers, however, have retained a certain level of autonomy with regard to the implementation of curricula and school programs.

The state runs the majority of educational facilities in Croatia. Some private and church-based initiatives care for children at the preschool phase. With just a few exceptions, city municipalities have jurisdiction over primary schools.

10.2.4 Evaluating Schools and School Achievement

The evaluation of schools and the education system in general is still in its infancy, and to date no independent system has been set up for this. National examinations were carried out in a range of subjects at some schools in 2007 and 2008. While the law provides for drastic measures in cases of violation of statutory regulations, such as disqualification from the profession, these are rarely applied. The assessment of the quality of school management is also still in an early phase; only recently has this issue gained currency in the discussion implemented by the Croatian School Institute on the further training of primary and secondary school head teachers.

Typically, quality assessment takes the form of self-evaluation by individual schools at the end of each school year. The criteria, however, are not consistent throughout the system; in addition, results are usually of a quantitative rather than a qualitative nature. Generally applicable standards, such as individual “bodies of knowledge” for each school level, are being developed. In the current absence of standards, however, the evaluation of the individual performance of primary and secondary school teachers is usually carried out by the Croatian School Institute; its assessment is also based on the judgment of head teachers and teachers’ and pupils’ committees. For this reason there is no national ranking of schools. University and college teachers are subject to a legally prescribed evaluation system that falls within the remit of the National Council for Higher Education (*Agencija za visoko obrazovanje*). After a specified number of years, they can either be promoted, maintain their position, or be degraded, according to their educational performance. In late 2003 it was decided that Croatia would participate in the PISA survey. The newly established National Examination Centre was entrusted with the task of preparing the introduction of standardized secondary school examinations (*državna matura*) by 2010.

In Croatia, 98 % of all pupils finish elementary school (primary and lower secondary education) in the prescribed number of years; 97 % of these pupils continue their education at upper secondary school. The majority of secondary school leavers meet the criteria for tertiary education. According to data available, about 20 % of pupils do not obtain an upper secondary school qualification.

Pupils’ overall performance and their performances in all obligatory and optional subjects are registered by means of a marking system ranging from the best mark 5 to the lowest mark 1 (from “very good” to “fail”). With the exception of years 1–3, pupils need to receive pass marks – at least a “2” (passed) – in all subjects in order to move on to the next year. Conduct is assessed descriptively by the form teacher in primary school; in middle school it is marked either “exemplary,” “good,” or “bad.”

Elementary school concludes with the completion of Year 8; there are no formal examinations. In elementary school, only about 0.6 % of children have to repeat a year; very few pupils leave school without successfully completing their primary education. Adolescents who do not finish primary school usually enter adult education programs carried out either in normal schools or in dedicated institutions.

In secondary school, approximately 2.2 % of pupils repeat a year. After the final year at upper secondary or vocational school, in contrast, there are final – *Matura* – examinations the passing of which enables the pupils to enter university or college.

10.2.5 Teacher Training

Teachers working in nursery schools (*odgojitelj*) have to complete a 2-year program at a college of education. Primary school teachers (*učitelj*) for Years 1–4 are required to have a degree from a college of education or university, whereas teachers of Years 5–8 – lower secondary level (*profesor*) or at vocational schools (*stručni učitelj*) – required university degree. Both courses take 5 years. Prospective teachers with a non-pedagogic university degree, such as qualified engineers, are required to obtain an additional qualification in education. Teams for the pedagogic improvement of schools are responsible for one or more schools; they comprise educators, psychologists, special school teachers, social workers, computer experts, and librarians who have completed a 4- or 5-year university course. They can be promoted and obtain the title of mentor (*mentor*) or counselor (*savjetnik*). A third level is being planned. In addition, the Primary and Secondary Education Act envisages the introduction of licenses that correspond to gradual promotion in an attempt to facilitate a higher standard of accreditation of teachers. Head teachers at all levels have to meet the same requirements as the respective teachers and, in addition, have to have at least 5 years of practical experience. A position is filled after a school's administrative committee has publicly advertised the post; in primary and middle schools, the school council (*školski odbor*) decides on the candidate, in nursery schools the administrative council (*upravno vijeće*). Both committees have the right to remove head teachers from office.

In tertiary education, there are assistants (*asistent*), teaching staff, and academic staff. The teaching staff comprises part-time lecturers (*predavač*), senior part-time lecturers (*viši predavač*), lecturers (*profesor visoke škole*), language assistants (*lektor*), senior language assistants (*viši lektor*), practical assistants (*umjetnički suradnik*), and senior practical assistants (*viši umjetnički suradnik*). The academic staff includes university lecturers (*docent*), special lecturers (*izvanredni profesor*), senior lecturers (*redoviti profesor*), permanent senior lecturers (*redoviti profesor-trajno zvanje*), and emeritus professors (*professor emeritus*). The latter is used as an honorary title.

10.3 Overview of the Structure of the Education System

10.3.1 Preschool Education

Pre-primary education is voluntary; approximately 113,000 children attend nursery school (*dječji vrtić*), i.e., about 40 % of children between the ages of 2 and 6 years.

The objectives of pre-primary education are based on a humanistic approach to individual development, in which the personality of every child is emphasized. The average teacher-pupil ratio is 1:13.5. In addition to teachers, nursery schools employ further qualified personnel such as social workers, psychologists, specially trained educators, and nurses. Pre-primary education programs cover four areas: (a) development of physical and psychomotor skills, (b) socio-emotional and personality development, (c) cognitive development, and (d) development of linguistic, communicative, and expressive skills. The programs are subject to the Guidelines on Pre-primary Education from 1991. Whereas nursery schools' programs must be approved by the Ministry of Education, the approval of measures for health care, hygiene, nutrition, and social care is within the purview of the responsible departments of the Health Ministry and the Ministry of Social Services. Approximately 20 % of children in the 2–3 age bracket attend nursery school; of the 3- to 6-year olds, about 80 % spend between 8 and 10 h in nursery school, 20 % between 5 and 8 h, and 3 % fewer than 5 h. Approximately 16 % of children attend preschool (*mala škola*), while about 13 % make use of special programs such as music, art, dance, foreign languages, or physical education. Group size varies considerably between 12 and 30 children. The most serious problems, however, are the lack of national educational standards, the shortage of rooms in some municipalities, the unsystematic funding of private nursery schools, the lack of institutions that take care of children between 6 and 12 months old, and the insufficient number of nursery schools in smaller towns and villages.

Nursery schools employ qualified counselors in order to meet the individual needs of children with learning difficulties; special institutions have been set up to the same end. Children from minority or refugee backgrounds are either offered specific contents in regular nursery schools or attend specially established schools with appropriate programs.

In 2007/2008 there were a total of 1,288 nursery facilities offering preschool services to 113,615 children. Of these, 24 facilities (2,577 children) were maintained by the state, 1,022 (96,829) by the municipalities, and 52 (3,035) by church bodies, and 190 facilities (11,174) were maintained by other private bodies.

10.3.2 Primary and Lower Secondary Education

The 8-year elementary school (*osnovna škola*) is made up of two levels: in Years 1–4, children are taught by a class tutor, in Years 5–8 by subject specialists. Compulsory schooling lasts until the age of 15 years. Completion of Year 8 entitles young people to attend secondary school. All children who have reached the age of 6 before 1 April enter primary school in the same year. Enrollment, however, can be postponed for 1 year. At primary school, pupils should acquire an elementary general education and develop basic forms of independence, personal interests, a positive system of values, and other personality traits. Primary schools follow standardized curricula (however, there are additional voluntary lessons such as religious education or a second foreign language, supplementary lessons, and

extracurricular activities). Children should be encouraged to take up educational offers that match their own interests and skills. In 2007/2008 special lessons were carried out for 6,728 children of national minorities at 115 elementary schools. Eight primary schools with a total of 756 pupils were maintained by private bodies.

Teachers of Years 1–4 require a qualification from a college of education or must have completed a 2- or 3-year program at university, whereas teachers of Years 5–8 need to have graduated from a 2- or 4-year university program and be qualified to teach one or two subjects. About 30 % of all primary school teachers have a university degree and 70 % a college degree. The overall teacher-pupil ratio is 1:12.5 While 60 % of all primary schools employ a school educator, only 2 % have a social worker, 20 % a psychologist, and 40 % a special educator. The latter is responsible for several schools; accordingly, special pedagogues spend only a part of their working day in each school. Every school, in contrast, has a librarian, although some of them work only on a part-time basis.

The curriculum consists of obligatory and optional subjects as well as electives. Weak pupils can opt for supplementary lessons, stronger ones for additional courses. There are between 18 and 25 lessons of 45 min per week. Croatian makes up about 20 % of the curriculum, a foreign language 15 %, mathematics 18 %, and natural sciences 20 %. The school year starts in early September and finishes in mid-June, which is the equivalent of 175 workdays. Pupils usually spend between 4 and 6 h per day in school. Most schools have divided the school day into two, some into three, shifts. Traditional teaching methods are the predominant mode of instruction; teaching units usually take the form of courses. The introduction of National Education Standards for Croatia (HNOS) for the elementary school (2006–2008) was accompanied by modern teaching methods at schools, and the National Curriculum (planned for 2009) is another step in the right direction.

The European orientation of the Croatian school system manifests itself in its school programs. Children have to take foreign language lessons from Year 1; in addition, they can opt for a second language from Year 4 onwards. These lessons, usually two sessions per week, are financed by the state. The program also allows for additional content, such as human rights or the Holocaust, which have been taught to pupils from other European countries as well. Extracurricular activities include academic and fine arts subjects, usually between one and three lessons per week. These study groups or clubs offer courses on music, literature, recital, drama, sports, or environmental topics; with regard to assessment, the pupils' performance in the extracurricular activities is on an equal footing with those in the regular classes.

10.3.3 Special Schools

Children with special education needs are cared for in regular day-care centers, but special facilities have also been established. Pupils with fewer special needs are taught in regular elementary school (with individual programs tailored or modified to meet their needs). In 2007/2008 there were 58 special elementary schools

accommodating 2,115 children and 33 secondary schools with 1,593 special needs pupils. All these schools were state schools.

There are also abridged programs over 1–2 years offering a mini-apprenticeship. They offer a general education programs and a short applied technical program and work experience. The function of curricula and school programs is to train these pupils for 27 different “auxiliary jobs” in 11 domains. Pupils with minor disabilities attend regular schools. The following grave problems complicate the education of disabled children: the lack of comprehensive pedagogic standards and qualified teachers; the shortage of rooms, adequate equipment, and textbooks; the division of the school day into two shifts; inappropriate and over-extensive curricula; and the unsatisfactory coordination of school and university programs.

10.3.4 Upper Secondary Education

Roughly 26 % of young people attend the general education secondary school (*gimnazija*). There are plans to extend this to 36 % by 2010. After 4 years, pupils can attain their certificate of secondary education – the *Matura* – which entitles them to enter higher education. Vocational secondary education is divided into 4-year technical-vocational schools and 3-year vocational schools. In addition there are special schools for children with physical or mental disabilities. These 3-year vocational programs are offered at both independent institutions or at normal schools.

Overall, young people can choose between roughly 170 secondary school education programs. The availability of places and pupils’ performance at school restrict enrollment in the first year of upper secondary school. Depending on the chosen program, between three and five subjects that are relevant to the pupils’ further education, together with their overall performance during the last 2 years at primary school, are taken into consideration. In addition, achievement at regional, national, and international school competitions affects pupils’ evaluation. About 95 % of the pupils who finish primary school continue their education at the upper level of secondary education.

Both general and vocational secondary schools are subject to nationally standardized regulations; these include a common school calendar and the division of the school year into two semesters. A school week covers 5 days and a lesson 45 min. While general secondary school teachers teach between 18 and 22 lessons per week, and practical teachers at vocational schools 28 lessons per week, qualified assistants work between 32 and 36 h. Teachers have at least 4 years of university education behind them and are specialized in one or two subjects. The teacher-pupil ratio is approximately 1:12, the average class size about 27 pupils. The function of general middle schools is to prepare pupils for further education at university or college level. Approximately 90 % of the curriculum is common to all types of general education secondary schools.

Vocational middle schools offer a variety of programs, such as electrical engineering, civil engineering and transportation, chemistry, economics, commerce,

hotel and catering trades, tourism, and public health. The 4-year courses at technical and similar vocational schools train adolescents for the labor market; pupils, however, can also continue their education. While the majority of teachers hold a degree from a 4-year university or college, subject teachers and assistants can have lower qualifications. Curricula and school programs consist of a general and a specialized section; the ratio of the former to the latter is 3:2. There are on average 28 pupils in each class; the teacher-pupil ratio is 1:10. At 3-year vocational schools, adolescents receive training which enables them to enter the job market immediately. General subjects constitute between 30 % and 35 % of the curriculum, theoretical subjects between 20 % and 25 %, and practical subjects about 40 %. Pupils can continue their training at several vocational colleges.

Every pupil who has successfully completed secondary school has the right to enter tertiary education. Admission, however, is subject to several criteria that vary between different courses of studies; as a result, not everybody who finishes secondary school can enter any course. Whereas university students are required to have completed 4 years of secondary school, vocational colleges also admit those who have completed 3 years of secondary school. Admission is contingent on the passing of a course-specific entrance examination and performance at secondary school. Several vocational colleges do not conduct aptitude tests; they accept students on the basis of their achievements in school.

In 2006/2007, 84 % of pupils in secondary schools took English as a foreign language, 42 % German, 14 % Italian, 4 % French, and 0.6 % other languages such as Spanish, Russian, Chinese, Japanese, and Arabic.

Special lessons for national minorities (Serbian, Czech, Italian, and Hungarian) were provided by 405 teachers for 1,760 pupils in 144 classes in 15 schools.

10.3.5 Post-Secondary Education

Although the labor market has signaled its interest in taking on employees with such a level of education, there have only been scant developments in this sector in Croatia. We shall have to wait for the results of the national qualification framework (*Nacionalni kvalifikacijski okvir*) which is currently defining this qualification level.

10.3.6 Adult Education

Because a large proportion of employees working in Croatia today cannot document the quality of education required by the labor market, adult education has become a current issue. Normal schools as well as specific facilities targeting adult education – especially public evening schools – offer a range of programs. At the beginning of 2007/2008, 4,364 people were taking courses in 59 institutions (1,491 people attended private facilities). The state has been investing in adult education in recent years, and it is to be expected that adult

education – under the remit of the National Council for Adult Education (founded in 2006) – will be expanded in the future.

10.3.7 Tertiary Education

In Croatia there are 113 institutions of higher education (*visoka učilišta*), organized as follows: 75 % institutions that offer university-based programs at one of the seven universities (*sveučilište*) and 25 institutions that offer 4-year courses at the two independent colleges (*visoka škola*) and 17 private colleges with 4-year courses and 12 “associate degree” – i.e., colleges that offer at least three different programs (*veleučilišta*) leading to professional studies.

The oldest of the seven universities is the University of Zagreb which was founded in 1874. The universities of Split, Rijeka, and Osijek were established in the mid-1970s. The University of Zadar was only founded in 2002 but invokes the spiritual heritage of the oldest university in the region, the Dominican college (*Generalno učilište dominikanskog reda u Zadru* oder *Universitas Jadertina*) that existed from 1396 to 1807. The University of Dubrovnik was opened in 2003, and the latest university in Juraj Dobrila was opened in 2006. With more than 60,000 students, the University of Zagreb is the largest university in Croatia. Zagreb, Split, Rijeka, and Osijek are comprised of faculties, the universities of Zadar, Dubrovnik, and Pula of departments. Faculties cover all academic disciplines (natural sciences, technology, biomedicine and health, biotechnology, sociology, humanities, and arts), and the faculties exercise a certain administrative influence on the universities. In contrast, the departments focus on social sciences and humanities, and the university plays a significant role in the organization of the department and the overall alignment of the institution.

The serious problems facing higher education in Croatia can be seen very clearly in the fact that only 50–55 % of students complete their chosen program (and only 15 % of these in the prescribed period), and only 8 % of these complete their examinations in the prescribed period. However, it is encouraging that the number of students rose by 82 % between 1990 and 2005. Thus, the proportion of a generation cohort completing a higher education program doubled in the same period from 14 % to 29 %. The largest proportion of this expansion is attributable to social sciences and humanities.

At the conference of European education ministers that took place in Prague in 2001, Croatia joined the European process to reform higher education that was formulated in the Bologna Declaration. This triggered a structural reform of the national higher education system. At the same time efforts were made to promote the higher education system, to improve its efficiency, and to harmonize it with the European education system. After the institutions necessary for reforming the system and ensuring the quality of it were founded, an evaluation of university courses, their curricula, and programs was conducted on the basis of the new criteria. This characterized the first phase of reform, during which the first two cycles of higher education were introduced.

There are three types of university program. After attaining 180–240 ECTS credit points and completing a 3- to 4-year course, students are awarded a bachelor degree. After attaining a further 60–120 ECTS credit points in the course of 1 or 2 years' more study, students are awarded a master's degree. Students cannot graduate from a single program until at least 300 ECTS credit points have been attained. Postgraduate programs can last 1 or 2 years. A doctorate can only be awarded to students who have completed a 3-year doctoral program in a specific subject area.

The majority of university and college programs run for 3 years for the first phase and 2 years for the second phase with some exceptions, which offer a 4 + 1 year program or an integrated holistic model (such as medicine of 6 + 0, law and teaching 5 + 0). The first generation of students enrolled under this new system started their programs in 2005/2006. At present, the universities are in a process of implementing postgraduate programs – of gradually transforming and evaluating them.

To date there is no reliable data on the first few years of the implementation. As a result it is not yet possible to make any statement on the comparable success of implementing the first two phases of study in line with the Bologna Process. Nevertheless, there are signs indicating that certain organizational problems have hindered a smoother implementation of the Bologna Process. Firstly, the influence of the four established universities (attended by the majority of students) is too weak in terms of the key areas of research and teaching. Given the power of the faculties, these universities are disintegrated which frustrates any greater flexibility. Secondly, although the funds to promote public higher education have risen continuously, the increase in student numbers has meant that per capita expenditure on universities has fallen. Consequently, universities have developed a market-oriented strategy – particularly in the field of social sciences and humanities – with preference given to students who can pay their tuition fees (or other market opportunities are being sought). As not all institutions are similarly competitive, inequalities have emerged. Moreover, only a small proportion of additional funds is actually invested in academic teaching, with a large element paid to up the salaries of those involved. There are some doubts about the quality of financially attractive universities, and the market cannot absorb the overproduction of graduates. Objectives and the strands of development of higher education cannot be finely defined until the conventional model of state funding of higher education which assigns monies to universities are completely replaced by budgeting. The absence of internal and external quality controls means that quality assurance is somewhat flimsy and programs cannot be synchronized in terms of documenting achievement as envisaged by the ECTS credit point system. Nor does it promote additional cooperation between programs: a further obstacle in the path of student mobility which is weak to begin with.

Some of the problems above have been recognized, and efforts are afoot to resolve them. For example, there are efforts to fund higher education by means of lump-sum budgets. Furthermore, in 2009 a system of external evaluation began to which all tertiary facilities are subject in a 3-year cycle. Work has begun on

improving the conditions of rooms, and in view of the shortage of qualified academic staff, young assistants are being employed.

10.4 Developments in the Current School System

A pressing problem is the transition from secondary school to higher education, especially with respect to social sciences and humanities. Despite the expansion in this area of higher education and the increase in the number of students contributing toward the costs of their programs, demand exceeds the number of admissions. In contrast, many programs in the fields of natural sciences, mathematics, and technology are finding it difficult to fill the number of places financed by the state with interested candidates.

A framework of qualifications to be elaborated by a government commission will be crucial to improving vocational education at all levels and to providing greater coordination with the labor market.

It is anticipated that the implementation of a final school leaving certificate due at the end of 2009/2010 will trigger the systematic introduction of an external evaluation system of quality in education and in the life of schools. External evaluation will bring about a decisive change to the nature of work in the education system. As a consequence, internal evaluation within the system itself will also be introduced.

Various campaigns against addiction, violence, and other forms of social deviancy are being conducted as part of the education system.

The highest number of dropouts can be found in higher education. Improved implementation of the Bologna Process should help remedy the problem, but there is no empirical evidence for this at present.

Measures to address the large group of Croatian diaspora, adaptations to the labor market, and the principle of mobility underlying the Bologna Process are reasons why the growing numbers of pupils and students who study abroad have to be reintegrated in the Croatian education system. Flexibility in the labor market and greater mobility of labor can both be achieved by adapting the education system to other European education systems and by introducing quotas for the admission of foreign workers. This will all help Croatia develop closer relations with the rest of the world.

10.5 New Developments

Questions regarding the practical implementation as well as both the scientific and political foundations of educational reform have dominated the professional, scientific, and political debates and have included topics such as the European orientation of the Croatian school system; a reconsideration of basic educational objectives and aims; democratization and increased pluralism of education; adjusting educational contents and qualifications to the requirements of the labor

market; equal opportunities; the relationship between formal, informal, and self-education; decentralization of the management and financing of the school system; opportunities to change from one school type to another, vertically as well as horizontally; a reconsideration of approaches to teaching and learning processes, especially with regard to the acquisition of transferable skills and knowledge on the one hand and the support of gifted children on the other; the education and training of physically disabled and mentally challenged children; scheduling on all levels of the school system on a daily, weekly, and annual basis; the introduction of a standardized secondary school examination which awards university entrance qualifications; written or oral assessment of pupils' performance and the transfer of pupils to the next year despite poor marks; and theoretical research in pedagogy and the scientific study of school development within the framework of a proposed Institute of Educational Research.

The Croatian school system is in need of reform, especially in view of European integration. The transition that the Croatian economy is undergoing is bound to affect the school system as well.

It is to be assumed that future research on education will supply answers to key questions that affect the education system in Croatia. These include a clearer understanding of methodological and theoretical-pedagogic approaches to school reform and thus the avoidance of negative effects caused by partial changes lacking scientific corroboration; the improvement of the proposed alterations and the adaptation of the concept to economic and social realities; the setting of a feasible timetable and financing scheme for the strategic implementation of the planned educational reform; the drawing up of training and funding plans for teaching staff in accordance with the proposed reform; the establishment of an Institute of Educational Research, which is to analyze and underpin the reform scientifically; and the development and implementation of a program of reform that achieves a dynamic balance between the compatibility of the Croatian school system with European regulations on the one hand and the desire to retain the substantial characteristics of the Croatian national curriculum on the other. Thus, a more realistic and qualified discussion of the problems and challenges facing the present Croatian educational system is becoming possible.

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P. Pashiardis (✉) • A. Tsiakiros
University of Cyprus, Nicosia, Cyprus

11.1 History and Social Parameters of the Education System

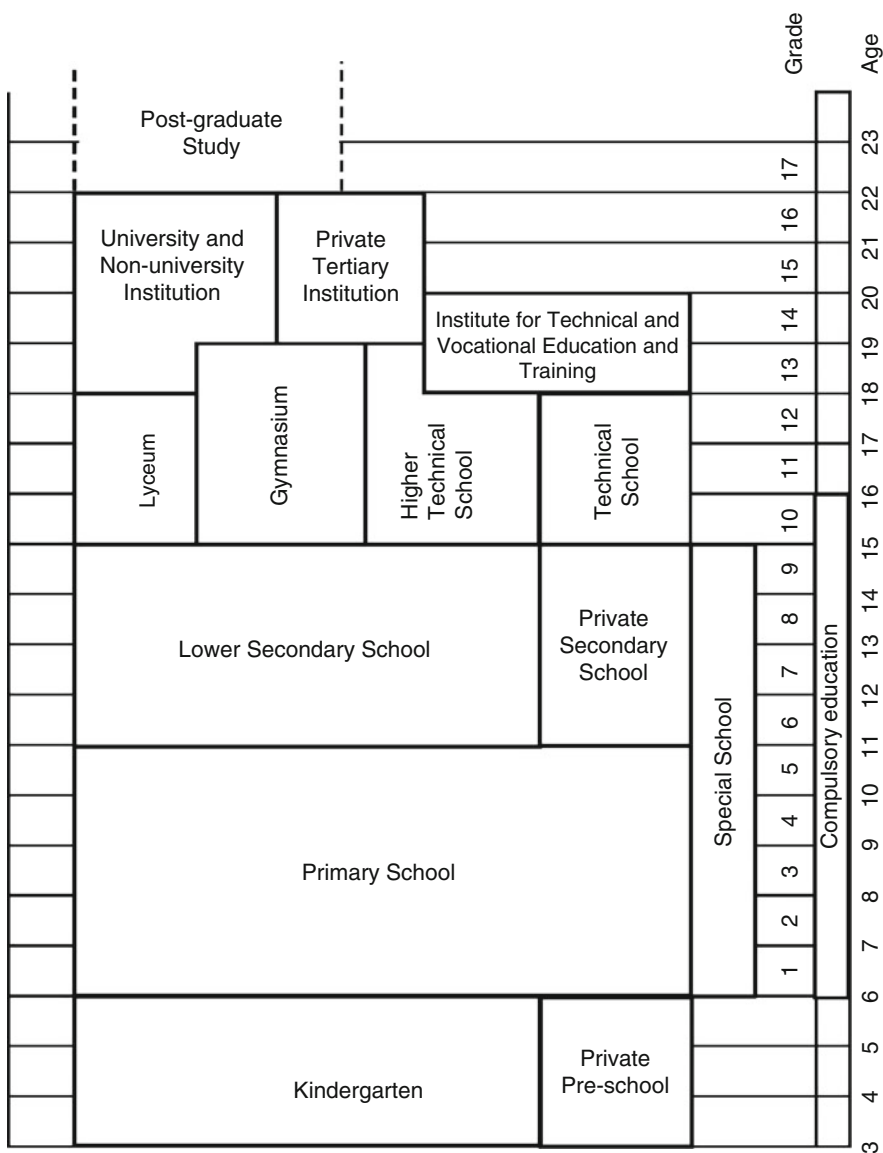
11.1.1 Cornerstones of the Historical Development of Schooling

In 1959, after the London and Zurich Agreements, Cyprus became an independent state. The provisions of the agreements placed education under two parallel Communal Chambers, one for the Greek community and one for the Turkish community. The Greek community aimed at strengthening the cultural and emotional links with Greece. A new curriculum for the public schools was developed similar to the Greek schools' curriculum, and also, the Teachers' Training College was modeled after the pedagogical academies of Greece. In 1963, violence broke out between the Greek-Cypriots and Turkish-Cypriots. As a result of the disturbances, the parallel system of the two Communal Chambers was abolished, and the two communities took steps toward separation. Following the separation in 1965, all the administrative functions of the Greek Communal Chamber were transferred by law to the Ministry of Education (since 1994, Ministry of Education and Culture, MOEC). It is now responsible for all Greek-Cypriot schools and for the schools of religious groups, which aligned themselves with the Greek-Cypriot community.

As of 2011, the estimated population of the island was 952,100 with an ethnic composition of 71.8 % Greek-Cypriots, 9.5 % Turkish-Cypriots, 18.7 % foreign residents, and a few Maronites, Armenians, and Latins (Catholics) (Statistical Service 2012a). These figures do not include Turkish settlers and military personnel, estimated at 160,000 and 40,000, respectively, who have moved into the Turkish-occupied areas since the Turkish invasion of Cyprus in 1974. At that time, one-third of the Greek-Cypriot population (about 200,000 persons) was expelled from their homes in the northern part of the island and was forced to resettle in the southern areas. For 2010–2011, the percentage of pupils in primary education in urban and rural areas was 69 % and 31 %, respectively (Statistical Service 2012b). The economy of the island depends on agriculture and tourism, which may be regarded as the major economic forces in Cyprus. The quality and standard of life are high, and the standards of health provision, the functioning of other social organizations, and the provision of public education can be favorably compared to those of the European Union (EU). Teaching in Cyprus is highly regarded as a profession, partly by tradition and partly because of the value accorded to academic study. Moreover, until recently the profession offered security of employment in an increasingly uncertain world. Despite the low unemployment rate, university graduates have difficulty in securing employment commensurate with their academic qualifications. Teachers' salaries compare favorably to salaries of other civil servants at the same levels (UNESCO Report 1997).

Parents have a statutory obligation to educate their children and they also have freedom of choice of the kind of school they desire for their child, whether public or private. When parents place their child in the public sector, their choice of school is restricted by their place of residence, although exceptions are generally possible when requested by families. The Cyprus education system promotes the establishment of "authentic" relationships with parents and other members of the school and

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the local community. Given the role parents play in their children’s learning and adjustment procedures, provisions are made so that schools incorporate strategies that bring parents closer to the school environment and offer them the opportunity to be involved in the life of the school. There are school parents’ associations for both primary and secondary schools; in recent years, these associations are becoming increasingly more powerful.

11.2 Fundamentals, Organization, and Governance of the Education System

11.2.1 Leading Ideas and Principles in Education Politics and Policies

Education is open and free to everybody, regardless of their financial situation, racial or ethnic origin, color, religion, belief, or gender. The MOEC takes various measures to ensure that all children and adults have easy access to lifelong education, without excluding children with special needs, the illiterate, or the elderly. Legislation provides for nondiscrimination against foreign children, hence securing their unobstructed access to education. One of the basic aims of the MOEC is the European dimension which is promoted in an interdisciplinary way through the syllabi of school subjects and other related activities. Moreover, schools participate in various programs of school links and exchanges (MOEC 2013). During the last few years, the MOEC has reinforced the school curricula and instituted programs in the field of human rights education. Special attention is also given to the educational programs for the children belonging to the Turkish-Cypriot community and to the religious groups of Maronites, Armenians, and Latins, through a system of subsidies. The MOEC subsidizes cultural activities for all religious groups, which include book publishing, performances, libraries, etc. Financial assistance is given to social and athletic clubs, which further helps in maintaining other elements of their identity. In addition, efforts are also being made in the fields of education and research, so as to further expand the knowledge of the culture, language, and religion of religious groups. The above activities promote the notion of living peacefully in a multicultural society and nurture positive attitudes toward minorities and foreigners living in Cyprus.

11.2.2 Legislative Framework of the Education System

The MOEC is the policy-making and administrative body of the government for education. It is responsible for the enforcement of educational laws and the preparation of educational bills. It prescribes syllabi, curricula, and textbooks. It regulates and supervises all the institutions under its jurisdiction and is responsible for the implementation of educational laws and the preparation of new legislation. Article 20 of the 1960 Constitution details the basic right to education for every person. The legislation uses this part of the constitution as its basis, and the law lays down the following provisions for education: Attendance for one year in kindergarten, in primary school, and in the lower secondary school is compulsory until a pupil graduates from the lower secondary school or reaches the age of 15; education is provided free of charge in public preprimary (one year), primary, and secondary schools – this includes lower secondary, upper secondary, and secondary technical and vocational schools; the textbooks published by the MOEC are provided free of charge to teachers and pupils; the Council of Ministers has the authority to provide transport to pupils living at a

distance from the school they attend – this is either subsidized or free of charge (Laws 24(I)/1993 and 220(I)/2004). The same curriculum is applied to all public schools in Cyprus in preprimary, primary, and secondary education (national curriculum). At the school level, there is no flexibility for curriculum changes except when teachers take their own initiative to prepare papers and handouts for the enrichment of the educational process. All modifications to the curriculum, if necessary, come as a direct result of policy decisions emanating from the MOEC.

The curriculum is exactly the same for all pupils up to the last year of the lower secondary education schools. After that the pupils are offered the opportunity to choose some of their subjects according to their interests. In any case, even the teaching and curriculum delivery methodologies used by teachers are oftentimes prescribed by the ministry, and there is not much room for deviation or experimentation, thus rendering complete centralization of the curriculum. It must be noted that the curriculum is mainly directed toward preparing the pupils for Greek-speaking higher education institutions. In contrast, the curriculum does not account for pupils wishing to pursue further studies in an institution other than Cyprus or Greece.

11.2.3 Governance of the Education System

Educational management is centralized. The highest authority of the MOEC is the minister, followed by the permanent secretary. Departments such as the Management, Planning, Registry, and Accounts Office help the overall functioning of the system, which mainly provides education at three main stages: primary (which includes preprimary and primary education), secondary (which includes secondary schools as well as technical and vocational schools), and higher and tertiary which includes public and private universities as well as public and private colleges or institutes. Other departments of the ministry include the Pedagogical Institute and the Cyprus Research Centre, as well as other services and units such as the Cultural and Technical Services, the Educational Psychology Service, the European and International Affairs Office, the Department of School Clerks Unit, and the Ministry's Store (MOEC 2013).

11.2.4 Funding of the Education System and Its Infrastructure

Public schools are financed from state funds. The government grants annually funds to the local school boards, which are responsible for the functioning of a number of schools under their jurisdiction. Since 2005, a new legislation has been implemented where an amount of money is allocated to each school and principals can use the money for the education of the pupils. The minimum amount per pupil is 854 € per year and above 125 pupils of the school receive 7 € each. The budget for 2012 was 1,045 million €. As a result of the economic crisis, for 2013, there is a decrease of around 7.5 % which means that the whole budget for education for this year is 966 million € (Budget Law 2013).

11.2.5 Relationship Between Public and Private Sectors in Education

A number of nonprofit and profit-making establishments ranging from missionary boarding schools to vocationally oriented institutions and foreign language centers offer tuition in specialized fields. Funded by overseas organizations or religious denominations and local entrepreneurs, private schools offer pupils the opportunity to pursue qualifications that would ensure their smooth transition into the professional sphere or the business world and their admission to overseas universities or local tertiary education establishments of their choice for diploma or degree studies. According to the Statistical Service (2012b) during 2010–2011, of the total pupils, 69.5 % were enrolled in public educational institutions and 30.5 % in private.

Although private schools maintain a considerable degree of independence in their operation and curricula, they are registered with the MOEC and comply with certain curriculum and facility requirements mandated by the Law for Private Education. Foreign language schools have six- or seven-year curriculum programs with English, French, Russian, or Arabic as the basic languages of instruction. A few private secondary schools are attached to primary schools providing an integrated 12- or 13-year program. Usually there are entrance examinations in private schools except in some cases where no exams are needed. Private schools raise their funds primarily from tuition fees along with some government assistance.

11.2.6 System of Quality Management and Support of Educational Establishments

There are no examinations as a means whereby the educational system or the school demonstrates accountability. As long as there are no national standards, schools do not feel compelled to indicate any form of accountability toward society at large. Some form of accountability is also provided by the inspectorate, but this is not organized in an official way that could help the system monitor its quality. Cyprus participates in international studies such as those conducted by the IEA and the OECD. The results of these studies provide an impetus for the quality improvement of the system.

Each education department has its own team of inspectors, which inspects teachers, deputy head teachers, and head teachers. Whole school inspections give the head teacher a grade based on which the head teacher may be promoted to an inspector, whereas inspections for newly appointed teachers are supposed to be carried out twice a year until they become permanent civil servants. Then, inspection becomes erratic and not so important until the 12th year of service for a particular teacher when (by law) the teacher must be inspected in order to earn a grade for promotion that usually happens between the 15th and 20th year of service.

The Pedagogical Institute has a developmental mission which covers all levels of education. Its activities mainly involve the in-service training of teachers,

educational research and evaluation, educational documentation, educational technology, as well as curriculum development (Tsiakkiros and Pashiardis 2002a, b).

11.3 Overview of the Structure of the Education System

11.3.1 Elementary Level (ISCED 0)

Before the age of three years, the children's care falls under the auspices of the Ministry of Labour and Social Insurance. Preprimary education (i.e., attending a kindergarten) is compulsory and free to children aged four to five years. Younger children take up vacant places in public kindergartens and pay low fees. The selection of younger children is made according to specific criteria decided by the Council of Ministers. Kindergartens fall into three categories: public, community, and private. Public kindergartens are founded by the MOEC. Community kindergartens operate only in cases where the available public kindergarten classes do not meet the needs of all the children in the community. They are founded and set in operation by the parents' associations or the local authorities, and they are registered with the MOEC, which grants a subsidy to cover some of the expenses. Parents undertake the rest of the expenses concerning the operation of these schools. Private kindergartens are established and set in operation by individuals in the private sector after the approval of the ministry. Their operation is regulated by the law regarding private schools and institutes. These are for-profit organizations (MOEC 2013).

11.3.2 Primary Level (ISCED 1)

Public primary education has been free and compulsory since 1962. It helps children acquire knowledge, develop right attitudes, and cultivate skills in situations in which children are prepared to face the changing face of the world in a responsible way. According to the ten-year schooling educational program, the aim of primary education is to create and secure the necessary learning opportunities for children regardless of age, gender, family and social background, and mental abilities. They shall achieve a balanced development in the cognitive, emotional, and psychomotor domains, while making the most of the means offered by modern technology; deal successfully with the various problems they may come across, including possible adjustment difficulties to the school and wider environment, and be prepared for active and creative participation in social, political, cultural, and financial contexts; promote socialization and positive attitudes toward learning; develop social understanding, belief in human values, and respect toward cultural heritage and human rights; and develop appreciation for beauty, disposition to creativity, and love for life and nature, in order to become sensitized in preserving and improving the environment (Eurydice 2013; MOEC 2013, p. 335).

11.3.3 Lower Secondary Level (ISCED 2A)

Secondary education is pursued in public and private schools. Public secondary education extends over six years. The lower secondary level is called gymnasium, with pupils between 12 and 15 years old, and is free and compulsory. Public secondary general education offers equal opportunities for education and pursues the promotion of knowledge in view of preparing pupils for their academic or professional pursuits. Innovations have been introduced such as computer studies in all grade levels, the establishment of language rooms, and the institution of the form teacher. Assessment is based on a variety of methods used for all grades and subjects, whereas written examinations are held every year in Modern Greek, history, mathematics, and physics. A pupil who successfully completes Year 3 graduates with a leaving certificate, which entitles the pupil to enroll in a lyceum or technical school to continue his or her studies.

11.3.4 Education for Children with Special Needs

The inclusion of children with special needs in the mainstream of education is a constant policy of the MOEC, fully aligned to international declarations. The education system proceeds to an early detection of children with special needs as early as the age of three, through the full assessment of their needs by a multidisciplinary evaluation group and the provision of all necessary means, facilities, exemptions, and special assistance by educational or auxiliary personnel for a smooth attendance in regular schools. Children with severe difficulties are educated in special schools, which are equipped with the appropriate staff in order to support and provide essential means to achieve their mission. A number of teachers of various specialties (teachers for intellectual, emotional, and other problems and teachers for the deaf, the blind, special gymnastics, music therapy, work therapy, speech therapy, educational psychology, audiology, and physiotherapy) meet the educational needs of children with special needs. During the school year 2011–2012, nine special schools were in operation with 311 pupils and 163 teachers (MOEC 2013).

11.3.5 Upper Secondary Level (ISCED 3)

The upper secondary (lyceum) covers the age range between 15 and 18 years old. It is cost-free and not compulsory. There is no system of examinations or other prerequisites in order to gain admission either to a gymnasium or a lyceum. The lyceum offers common core subjects, which are obligatory for all pupils, and optional subjects. Common core subjects offer general education, multifaceted development, and acquisition of general skills, which are required by the contemporary realities. All subjects in the first grade are common core subjects.

In the second and third grades, pupils attend common core lessons and at the same time choose optional subjects which interest them for systematic and in-depth study. A pupil who graduates from a lyceum after completing the third grade is awarded a leaving certificate (MOEC 2013).

11.3.6 Postsecondary (Non-tertiary) Educational Establishments (ISCED 4)

Secondary technical and vocational schools accept pupils who graduated from the gymnasium at the age of 15. Each school has two departments, technical and vocational. By offering a balanced curriculum of general and technological education, Secondary Technical and Vocational Education (STVE) aims to offer pupils the required knowledge and skills which will prepare them to enter the world of work well equipped or continue further studies in their chosen area. STVE is offered in two main directions, the theoretical and the practical direction, and in various specialties in twelve technical schools. Technical school graduates can compete with lyceum graduates, for places in tertiary education institutions, by taking the centrally administered entrance examinations. The Apprenticeship Scheme, in operation since 1963, addresses dropouts from the formal education system, between the ages of 15 and 17. Apprentices are employed in industry, where they receive on-the-job training and have the opportunity for general education and school-based vocational training on a day-release basis for a period of two years. The evening classes offered at several technical schools aim to provide individuals with the opportunity to enrich their knowledge and abilities and compete for employment in a rapidly changing world. The evening classes provide formal STVE programs, programs of continuing TVE, and programs catering for the preparation for national and other examinations.

11.3.7 Tertiary Level and Similar Establishments (ISCED 5A/5B/6)

The Department of Higher and Tertiary Education is the competent authority regarding all sectors and issues related to higher education. There are three public and five private universities operating on the island (MOEC 2013). Nonuniversity public tertiary education is offered by higher education institutions which provide education and training in professional disciplines to satisfy the local demands. The public universities, as well as all other public tertiary institutions, restrict the intake of students each year. With the exception of the Open University of Cyprus, prospective students have to pass the examinations set by the MOEC. Admission to the public universities is highly competitive. Cyprus joined the Bologna Process in 2001 which signaled its support to the main objectives of the process, namely, the increase in mobility and employability of European higher education graduates, thus ensuring the competitiveness of European higher education.

11.3.8 Adult and Further Education and Training

The Adult Education Centres provide general adult education in Cyprus. Their main objective is the general development of each adult's personality and the provision of lifelong learning opportunities for all citizens. The centers have offered education and training to thousands of adults, first mainly in rural areas and, from 1974 onwards, also in most urban areas, and today, offer learning opportunities to persons aged 15 and above. During the school year 2011–2012, more than 30,000 citizens have attended the large number of courses offered in approximately 400 centers with more than 800 qualified instructors employed. Further education institutions offer equal opportunities of education and promote lifelong learning as well (MOEC 2013).

11.4 Developments in the Current School System

11.4.1 Transition Between School Levels

The UNESCO Report (1997) noted that the structure of the educational system suffers from discontinuity, especially at primary-secondary transition. Even though the new curricula cover the 9-year period of compulsory education, teachers seem to have little knowledge of the respective school level curriculum. Pupils transferring to lower secondary education have learning difficulties without the support of a clear formal and effective transition program. Similar problems exist between preprimary and primary education (UNESCO 1997). It is up to individual schools to initiate joint meetings and visits and to establish good linking.

There are no state examinations for primary education except some diagnostic and formative examinations performed by the teachers themselves. Since 2005, the Centre for Educational Research and Evaluation carries out a longitudinal study to evaluate the literacy level of primary school pupils at Years 3 and 6 in language and mathematics (MOEC 2013). The main purpose of the evaluation is to identify pupils at risk to face literacy problems by the end of primary education. Every pupil gets a school-leaving certificate at the completion of Year 6. There are exams for university entrance during the last year of upper secondary education. They are prepared and administered centrally by the MOEC, and the subjects differ based on the university department or discipline area(s) the pupils are applying for.

11.4.2 Instruments and Measures of Quality Management

Teachers are required to use a variety of techniques for the assessment of their pupils' abilities which must be governed by the following principles: The assessment is considered as an integral part of teaching; the aim of assessment is not the selection or rejection of pupils but the provision to help all children so that they can reach their full potential; and the content of assessment must correspond to the

curricular objectives. Three different types of evaluation are required, depending on the time at which evaluation takes place, the initial diagnostic evaluation, the continuous formative evaluation, and the final evaluation. Different evaluation techniques are used in order to ensure that the assessment carried out by teachers may be subject to control. For this reason, the following techniques are recommended: written tests, observation, communication, and pupils' self-evaluation (Cyprus Eurydice Unit 2010).

The system of external evaluation is centralized and carried out by inspectors. The main aim of this inspection is to ascertain the effectiveness of the school as a whole unit. This inspection covers all areas and aspects of school life, both managerial and teaching, and reviews the aims set by the school for itself and the national objectives that schools are expected to achieve. The inspection is carried out by a team of inspectors; the schools to be inspected are notified one month in advance. Inspectors are permitted to observe single lessons and lesson plans to ensure that the work being carried out is in line with curriculum requirements and check the written work of pupils. It is not the objective of the major inspection to evaluate individual teachers, and teachers are not therefore given individual feedback. The inspection aims to evaluate the school as an entity rather than individual teachers; teachers are not therefore given individual feedback (Cyprus Eurydice Unit 2010).

11.4.3 Coping with Special Problems

In the last few years, a growing number of juvenile delinquency incidents have taken place especially at secondary school level. To address this problem, some programs and institutions for the prevention of violence and juvenile delinquency have been implemented. Educational psychologists may support schools, pupils, parents, or teachers.

The regulations of primary education stipulate that a child may have to repeat a year, based on the approval of the school's inspector and following notification of the parents (Regulations on the Operation of Public Schools of Primary Education 2008). With regard to secondary education, during the school year 2009–2010, 1.8 % of the pupils failed and 1.6 % dropped out (Statistical Service 2012b).

11.4.4 Measures and Instruments for the Integration of Immigrant Pupils

During the school year 2011–2012, 13.2 % of the pupils attending public primary schools did not speak Greek as their mother language. Bearing in mind that nowadays the society is becoming even more multicultural, the MOEC approaches the subject of multicultural education with great sensitivity. This means that it is of vital importance to provide education that supports the language and distinctive cultural features of the various ethnic groups but also to provide education that

helps bilingual pupils to learn Greek as their second language for a smoother transition to the Greek-Cypriot society. In response to these demands and the changing social environment, both national and international, the MOEC is promoting the implementation of educational measures and policies that will facilitate the smooth integration of migrant pupils in a creative environment, regardless of background (MOEC 2013).

Multicultural education is currently being practiced in the form of measures for language support, which refer to the learning of Greek as a second language, and measures for facilitating the smooth integration of groups with different cultural identities. The model that is currently being used is the mainstreaming program in which bilingual pupils participate in the classroom along with the native Greek-speaking pupils. This includes placing bilingual pupils in a separate class for some hours, for intensive learning of the Greek language and specialized assistance according to their specific needs. Adult Education Centres offer afternoon classes for learning Greek as a second language to the children of the returning ethnic Greeks but also to all those interested in the subject. Moreover, pupils can attend afternoon classes for learning their mother language.

The Department of Primary Education has promoted several cultural measures to promote multicultural awareness. The department has provided all schools with educational material and provides teachers with the opportunity to further develop their learning and teaching approaches to all children. Within this context, it organizes in-service training seminars and conferences for teachers who teach bilingual pupils (MOEC 2013).

11.5 New Developments

The Cyprus Educational System is now open to a wide range of influences, which create the need for change and improvement. In the international arena, challenges emanate from the rapid development of science and technology, the development of information society, and globalization. These factors are very important for Cyprus as its economy is small, heavily reliant on its human resources, and vulnerable to external factors. The fulfillment of the basic goals of the country concerning its upgrading to an international and regional center of services, the adjustment to the information society, and the improvement of the quality of life require changes and a new role with regard to the education sector. The European dimension intensifies the need toward harmonizing the education system to European educational practices and policies, without neglecting the local culture and character of the Cyprus system. Furthermore, the most important challenge arises from the strategic goal set by the Lisbon Convention for the European Union to become the most competitive and dynamic knowledge-based society in the world by 2020. Education is considered as an important means for social mobility and active participation in the society and a basic tool for effectively combating a number of different social problems. New challenges arise from the increasingly multicultural nature of society at large, which has an effect on the educational system as well.

In view of these challenges, the necessity for the continuation and strengthening of the education sector is acknowledged. That is why education is considered as a major investment toward progress in the socioeconomic and the cultural domain, in the short as well as the long term, especially in times where there is a severe economic crisis, such as the one that Cyprus is currently undergoing (MOEC 2012).

Since 2005, the government of the Republic of Cyprus has initiated an ambitious educational reform program with an aim to turn into reality the vision of a better educational system that will meet pupils' future needs and society's challenges in the twenty-first century. The participation of all stakeholders in the dialogue has been an innovative feature which aims at building consensus to the highest possible degree and the continuity of the educational policy. For this purpose, three councils were set up, the Council for Primary and Secondary Education, Council for Higher Education, and Education Council, with representatives from the government, the teachers, the pupils, the students, the parents, the universities and other higher education institutions, the bodies responsible for quality assessment in higher education, and major political parties.

In the last few years, a number of innovations have been introduced, and various measures have been implemented which all contribute toward achieving the national targets set at the National Reform Programme. They refer to reducing the rate of early school leavers to 10 % by 2020 and increasing the participation in higher education to 46 %. The measures are considered: introducing new curricula from preprimary to lower secondary education and new timetables in primary education, establishing optional and unified all-day schools, reducing the number of pupils per class, dealing with pupil's delinquency, establishing postsecondary institutes for technical and vocational education and training, further promoting multicultural education, establishing a Centre for Educational Research and Evaluation, upgrading the preservice teacher training programs, establishing an induction program for newly appointed teachers, implementing a new system of university entrance examination, establishing new universities, changing the setting of higher education, and implementing a student welfare package (MOEC 2013).

The MOEC is aiming toward the qualitative upgrading of the system in order to become more flexible and adaptable. Its goals in particular are the unification of the system ensuring unity, continuity, and consistency between all levels and services of education; the linking of the education system with productivity; the continuous improvement of the material infrastructure; the improvement of the selection, training, and appraisal processes of teachers and principals; the further enhancement of conditions conducive to coexistence, cooperation, and combating intolerance and xenophobia; and the further promotion of educational research and evaluation (MOEC 2012). Education in Cyprus is "aiming at forming integrated, responsible and democratic citizens who are capable and skilled to respond to the needs and demands of a contemporary and constantly changing world" (MOEC 2012, p. 80). It is supposed to be able to contribute toward the political, economic, and social progress of their country. Therefore, the education system needs to move toward more decentralization and empowerment at the school level.

It goes without saying that more decentralization means more able school head teachers to manage the schools; thus, selection and training of the school leaders of the future becomes an imperative (Huber and Pashiardis 2008).

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B. von Kopp (✉)

German Institute for Pedagogical Research, Frankfurt/M., Germany

12.1 History and Social Parameters of the Education System

12.1.1 Cornerstones of Historical Developments

The educational tradition of the Czech Republic is determined by its history marked mainly by the Kingdom of Bohemia, the Habsburg monarchy up to 1918, the establishment of the Republic of Czechoslovakia from 1919, a turning point brought about by the Munich Agreement, the postwar period with its struggle between West-East orientation, the period of Communist domination from 1948 to 1989, and the subsequent social transformation. Some of the key moments of this tradition as related to education include the founding of the Charles University in Prague; the Bohemian reformation of the Hussite period with its reference to the written word of the Bible made accessible to every man, which brought with it a wave of literacy and the notion of general education; the impact of the humanist Jan Amos Comenius (1592–1670) whose educational ideas and works were ahead of their time and in many respects have not lost their significance today; the embedding in the cultural region of Habsburg Absolutism, whose pragmatic support for education proved to be fertile ground for educational developments especially in Bohemia where full literacy was nearly achieved at a very early stage in history and which led to a remarkable expansion of secondary education; the special role of the national movements which built up the Czech education system in the face of resistance from the German Bohemians and Vienna; and the high esteem that education enjoyed in Czechoslovakia (1918–1938) expressed in the rapid expansion of the Slovakian and Carpatho-Ukrainian school system, in educational reform initiatives, in the challenging expansion of vocational education which led in many cases to matriculation, and in private initiatives such as the famous “School of Work” of the Bat’a group of companies. In contrast, the Munich Agreement, the division of Czechoslovakia and the occupation of the country, tended to marginalize Czech education.

After 1948, Communist politics was highly influenced by the Soviet Union, and educational opportunity was subject to rigid policy of social redistribution; a rapid expansion of the secondary school sector, which included standardizing schools, cutting school time in the wake of heavy industrialization, and mobilizing a fast-growing population of workers; and the accelerated development of vocational training. Khrushchev’s political reforms also affected education. The Party Congress of 1959 approved the target of providing vocational education for “nearly all young people” within a period of 10 years. The path to this aim included making general education schools more technical on the one hand and increasing the general and theoretical components of vocational colleges on the other hand. Vocational education benefited mostly from this, but the development also led to destabilizing general education secondary schools, frequently changing types of objectives, and many organizational changes. Overall school time up to and including matriculation in the 1950s was shortened to 11 years; increased to 12 in the 1960s, increased to 13 years in the 1960s, and in addition the general education upper secondary schools being renamed into “gymnasium” (the traditional name prior to 1948). In the 1970s

Czech Republic

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												22	22
												21	21
												20	20
												19	19
												18	18
												17	17
												16	16
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and 1980s, school time was reduced again to 12 years following the shortening of time at primary school only to be increased again to 13 years in 1989.

The “velvet revolution” of 1989 meant a radical new beginning, the comprehensive democratization and pluralization of society, and a fundamental reorientation of educational, curricular, and governance policy. The 8-year secondary “gymnasium” school was reintroduced (a concept discussed during the Prague

Spring of 1968 but never realized) while maintaining a separate 4-year upper level gymnasium; private education was reestablished and the education system de-ideologized. Without all this, the demanding process of liberalization and democratization would have been problematic.

12.1.2 Key Phases of Reform and Innovation in Education in the Last 30 Years

The fundamental line of development over the first part of the last 30 years was built on the legacy of educational policy in the light of the “normalization” process installed by the Communist regime after the suppression of the Prague Spring. In 1984, a comprehensive reform act following the guidelines of these developments was passed. In the 1960s, policy makers rejected two opposing models of school, one a polytechnic and the other a general education model, as the main form of mass secondary education. Instead, the decision was taken to promote expansion by more closely connecting the three pillars of the existing general education and vocational school forms, with vocational education being considerably strengthened.

However, an OECD report published during the transformation phase following 1989 recommended Czech educational policy to emphasize general secondary education as represented by the grammar school or gymnasium at the expense of vocational education. In actual fact, the proportion of pupils attending grammar school fell between 1985 and 1995 from 15.9 % to 14.6 %, and the proportion of vocational education pupils also fell in the same period from over 60 % to 46 %. This was largely the consequence not of educational policy but of a crisis in vocational education as a result of the privatization of industry, which initially divested non-profit-making school and training centers. At the same time, the proportion of secondary school facilities leading to a double qualification (vocational and university entrance qualifications) rose steadily from around 25 % in 1985 to 38.5 % in 1995 (von Kopp 1998). Thus, in contrast to OECD recommendations, the proportion of vocational-based secondary education rose significantly even during the transformation phase. This trend is not necessarily attributable to any obstruction politics on behalf of the Czech Republic to counter OECD recommendations but to traditional structures of the training and employment system, inherited vocational and school prestige, and a corresponding demand from pupils/families themselves (von Kopp 2009). Nonetheless, secondary education continued its overall expansion. The proportion of an age cohort completing upper secondary education rose from just over 40 % at the end of the 1960s to 65 % in 1997 and to around 70 % in 2003 (Statistická ročenka 2007). One consequence of this expansion and diversification is however the problem of a principle pursued in the past of providing a uniform and equivalent school-leaving certificate for all forms of school, a problem that has hindered the process of reforming certification somewhat.

In the wake of a dramatic economic crisis in the first half of the 1990s caused by the radical restructuring of the whole economic system, the separation from

Slovakia, and the emergence of privatization, the economy developed to become extremely export focused. These developments also changed the structure of employment across the various sectors and, with it, demand for professions and qualifications: In 1970, 40.6 % of the working population was still employed in industry. By 1995, this had dropped to 32.5 % (von Kopp 1998). Employment rose in construction, finance, tourism, health, and social services, in commerce, in repair work, and in other services. The number of people employed in the private sector rose extraordinarily from just 0.3 % of all employees in 1985 to 31 % in 1992 and 47 % in 1993 to over 57 % in 1995 (von Kopp 1998). By the end of the 1990s, this transformation was by and large completed. All these changes had significant consequences for quantitative and qualitative demand for education and qualification profiles, and this process continued to be influenced by fluctuations in the economic climate. The economy remains strongly dependent on exports and the increasing ties within the finance sector.

12.2 Fundamentals, Organization, and Governance of the Education System

12.2.1 Political, Economic, and Cultural Conditions of the Current Education System

When Czechoslovakia was divided in 1993, the Czechs accounted for 9 % of the population of the new Czech Republic. The Slovaks accounted for another 3 %. The 16 other nationalities listed in the 2001 census (including those with dual nationalities) each accounted for less than 1 %. Although the Roma population is not small, traditionally only few classify themselves as such in a consensus, with most describing themselves as Slovak or Czech. Estimates suggest that this group comprises at least 250,000 people, or around 2.5 % of the total population. Overall numbers of (legal, half-legal, illegal) foreigners living and working in the country is not known; although numbers did grow quickly at times, these tend to be linked to the economic climate. At the end of 2008, around 410,000 non-Czech nationals had registered with their local authorities, roughly 4 % of the total population. The increase in migration has placed corresponding demands on the school system. Conditions required for pupils from migrant families to achieve success in school vary and often hinge on the respective sociocultural background of the families. In schools, it is striking how highly motivated and academically successful children from Vietnamese families are. At university, foreigners account for around 10 % of the student population (Statistická ročenka 2013).

12.2.2 Legal Regulations, Governance, and Funding

The current school system is based on the comprehensive and profound reforms implemented at the beginning of the 1990s, appropriate laws and amendments, and

additions, primarily the 2004 Act that had been amended on several occasions up to 2007. In addition, there are new special Acts relating to further education (2006), private schools (1999), educational staff (2007), and higher education (1998).

General responsibility for the education system lies with the Ministry of Education (actually Ministry for Education, Youth, and Sport). Today, one of the main tasks of the Ministry is to develop medium- and long-term “master plans” and to provide general governance over the education system. These plans are based on documents relating to the national budget, regional development, the European educational process, the annual reports of the Czech school inspectorate, and evaluations of the current educational policy and its implementation. Since 1997, the Ministry prepares annual education reports. Today, the Ministry is only directly in charge of some few schools (e.g., school where the language of instruction is not Czech) and some specific facilities such as those for in-service teacher training. Higher education has its own structure of supervision. Under Czech law, higher education facilities (some universities are subject to supervision by specialist ministries) are self-administering autonomous units. In terms of accreditation and evaluation, which it normally does not carry out itself, the Ministry ensures minimum standards for equipment and the quality of teaching and research in higher education. Higher education facilities must acquire additional funds themselves.

Municipalities hold direct competence for primary schools and the regions for secondary schools. The latter are also under the supervision of higher colleges as are special schools, children’s homes, and other public secondary and in some cases postsecondary educational facilities. After 1990, political controls carried out by the former municipal and regional “national committees” and their educational departments that were under the supervision of the Ministry of the Interior were dismantled. The supervision of preschool and primary school facilities was transferred by law to the newly defined school offices at local district (*Okres*) level. These are independent of general state administration and exercise general supervision over schools maintained by other bodies (municipalities, foundations, private individuals) and partially maintain school facilities themselves. The autonomy of the school means that the headteacher is fully responsible not only for the quality of the educational process but also for the financial management of the school, for the appointment and dismissal of teachers, and for maintaining relations with the municipality and the general public. General supervision of secondary school is the responsibility of newly defined regions (*Kraj*) set up in 2000, self-administering elected units. These are responsible for all investment and running costs, except for some costs borne by the Ministry.

Funds given as a lump-sum to the regions and municipalities from the national budget are distributed in accordance with a complicated formula that is largely based on pupil numbers, the tier and type of school, and certain costing methods. The breakdown of this “normative” is updated annually. Regions compile medium- and long-term educational development plans and education reports. Funds are allocated to private schools including Church schools directly by the Ministry. Once they have met defined criteria, they are normally entitled to 60 % of the

respective normative; if certain special educational services are provided, schools may however apply for 100 % funding. In 2001, 4.2 % of GDP was allocated to education; since then, it has hovered at around 4.4–4.5 %. In 2007, 8.3 % of public expenditure on education was allocated to preschools, 31.6 % to primary schools, 21.9 % to secondary schools, 22 % to higher education, and the rest across the remaining educational facilities. Expenditure per pupil brought different results: taking expenditure per primary school pupil as a base (100 %), preschool children received 88 %, grammar school pupils 92 %, vocational college (*SOS*) and polytechnic (*VOŠ*) students 99 %, vocational pupils (apprentices) (*SOU*) 131 %, and university students 219 %. These costs have risen very quickly in just a few years – between 2000 and 2005, by 38 % for the preschool sector, 77 % for primary school, 52 % for grammar school, 34 % for *SOS/VOŠ*, 53 % for *SOU*, and 31 % for higher education (Eurybase 2007/2008; Eurydice-Eurostat 2009). The slowdown in economic growth over the last few years has led to across-the-board attempts to cut costs. One of the conditions for the effective distribution of funds is, however, the systematic supervision of the complicated normative system and the various competences for these funds; all of which is still missing today.

Besides receiving a grant, university students have access to a loan system, which banks more than willing to provide the credit. However, around 20 % of students have debts beyond their regular loans. This figure rose significantly in 2011 and 2012 although the figure is still quite low when compared internationally. On the other hand, students in the Czech Republic often borrow money from parents and relatives.

The school inspectorate plays an important role in the supervision, evaluation, and accreditation of schools. Since 1989, their position and function has been comprehensively reformed. Inspectors are no longer public servants, but employees of the Czech School Inspectorate. The Inspectorate maintains regional offices and is independent both of other national offices as well as of private maintaining bodies. The current situation regarding educational supervision and governance is the result of comprehensive decentralization of general administration and of educational administration and funding. Although there were some decentralized measures in education in the 1990s, most fundamental reforms were pushed through in just 2 years from 2001 to 2003.

12.2.3 Private Sector

There have been private lay and Church schools at all levels since the beginning of the 1990s. In the preschool and primary school sectors, they play, with 1.97 % and 0.5 % of the overall school population, only a minor role. However, just fewer than 15 % of all secondary school pupils attend a private facility and 21 % of students attend a private university (Statistical Yearbook 2013). In the course of the last 10 years, public capacity in the preschool sector has declined, whereas the numbers of half-private and fully private facilities operating in line with state guidelines have increased. The functional differentiation and the social role of private secondary schools and universities have grown significantly in the last 20 years.

12.3 Overview of the Structure of the Education System

12.3.1 Preschool Education

Preschool education has undergone some fundamental methodological and legal changes in the last few decades. An Act of Parliament passed in 1960 divided preschool education into two phases: crèches (*jesle*), supervised by the Ministry of Health, and the nursery schools (*mateřská škola*), which are an element of the regular education system. In 1967, detailed programs for both facilities were passed. Programs for crèches were guidelines, while those for nursery schools were binding. By 1976, all preschool facilities, stand-alone and combined crèches and nursery schools, as well as children's homes and summer camps, were merged less than one joint preschool education administration and new, detailed curricula for crèches and nursery schools passed. However, these were virtually discarded prior to 1989 as too rigid and demanding. Since 2001, new guidelines and framework curricula for nursery schools have been approved, which since then have been described as schools and not, as was the case in the past, as "day care facilities." New curricula issued in 2005 giving nursery schools the opportunity to elaborate their own educational programs have been implemented since 2007.

Nursery schools take care of children between the ages of 3 and 5 year (in some special cases also 2- and 6-year-olds). Since 1990, special preparatory classes in both nursery and primary schools have been set up for socially disadvantaged children. Since 2005, these classes have mainly been provided in primary schools. Today, crèches are again under the administration of the Ministry of Health and are no longer part of preschool education.

In 2002, the EU approved a declaration in Barcelona according to which early childhood education is to be strengthened with the intention being to accommodate at least 33 % of all young children in crèches by 2010 in all EU member countries. In the former Czechoslovakia, the Communist Party promoted crèche education for ideological and employment reasons, but this rate never exceeded 24 %. After 1990, it fell to around 0.5–2 %. At the beginning of February 2009, the Czech Minister questioned the Barcelona declaration during a meeting of European ministers for employment and social services. However, this was rejected by the majority of ministers, giving rise in the press to a discussion between the different fractions.

Despite this rejection, an initiative of ministers declared in May 2008 that a reaction to the growing demand for child care for professional parents needed to be undertaken, but that the state would prefer to take a backseat. Today, companies are entitled to set up their own nursery facilities and offset operating expenses against tax. These facilities (crèches and nursery schools) are subject to state accreditation with the Ministry appealing to parents to control both educational and hygiene standards. In the last 20 years, the number of crèches and nursery schools has fallen drastically. The reasons for this can be found in the socio-ideological reasons given above for early childhood, but also in the financial restraints on municipalities, which, in times of economic upheaval, did not necessarily prioritize preschool

education. In addition, the number of company facilities fell dramatically in the course of the transformation process. In the meantime, it is clear how much the Czech aims have become removed from EU aims with regard to the provision of preschool facilities. Although efforts are being made to improve the provision, and the numbers of facilities and children cared for are actually rising, this is only being achieved with the help of private facilities, most of which are not cheap (on average they cost half a monthly salary). However, demand is still exceeding supply and the number of children without a place in preschool rose from around 13,000 in 2007–2008 to 59,000 in 2012–2013. At present, more and more facilities are being opened, some under makeshift conditions (e.g., in containers). At the same time, the latest birth statistics are predicting a fall in the child population so that there may well be an excess of places once all planned preschool facilities have been built.

12.3.2 Primary Education

The lower part of the 9-year basic school (*základní škola*) offers conventional primary education. By and large, this phase does contain any specialist lessons and teachers at this level are trained in dedicated programs. The duration of this phase has been changed ten times in the last decade from 5 to 4 years and back again. Since 1995, it covers 5 years. In 2004, principles for a new two-phase curriculum development were agreed. In 2005, the Ministry approved a national framework curriculum for primary schools and decided that schools should fill this framework with their own curricula up until 2007–2008. The fundamental educational principles behind the new curricula primarily include stimulating creative thinking, developing awareness for problems, cooperative skills, a free-thinking personality, and key competences (Eurybase 2007/2008).

12.3.3 Lower Level of Secondary Education

The 9 years of compulsory schooling can be extended by a voluntary year. This is undertaken either in the 4-year upper phase of the basic school (*druhý stupeň základní školy*), in the lower phase of the grammar school, or in some cases the lower phase of the conservatory. Since 2004, the number of lessons in the upper phase of basic education has been increased to achieve a degree of equality with the lower phase of the 8-year grammar school. The Education Act of 2005 strengthened the opportunities for schools to establish their own profiles on the basis of the framework curriculum. To mark the successful completion of basic education, pupils are awarded a school-leaving certificate and a school report. If the pupil is not successful, appropriate years have to be completed until the end of compulsory schooling. Less than 1 % of pupils have to repeat a year. The basic school offers additional courses for pupils to attain their basic school education at a second chance. The proportion of young people (including pupils at special schools) who

do not attend an upper secondary school after compulsory schooling has fallen in recent years from 6–8 % to 3.5 % (Eurybase 2007/2008). As early as 2002, the number of early school leavers for the Czech Republic stood well below the EU average of 18.5 %. Together with Slovenia and Slovakia, the country held one of the top places.

A special form of lower secondary education with a long tradition is the around 720 basic school type of facilities with extended specialist lessons in some subjects (mathematics, languages, sport, music, art, IT, and others). Another special form of educational facility is the basic school with an arts focus; overall, there are 476 such facilities. These are an accepted component of the school system and offer programs for around 230,000 pupils in a variety of artistic directions to complement, and in coordination with, the regular school (Eurybase 2007/2008). These facilities are primarily intended for basic school pupils, but are also open for secondary school pupils and adults. The arts-focused basic school can lay the foundation for later attendance at a conservatory or arts college, although this is not a prerequisite. A pilot project is currently developing plans for lessons at an arts-focused basic school along the lines of the general framework curriculum which will further integrate the facility in the overall school system. Generally, there are ongoing discussions about updating the curricula, with a variety of groups in favor of having indispensable content within the canon of the school.

There are also a number of extracurricular facilities at schools – school clubs, canteens, guidance officers, etc. – that are components of the school system. The majority of basic school pupils and half of the secondary school pupils eat lunch at school.

12.3.4 Transition to Upper Secondary School

When pupils complete Year 9 of basic education, they have the chance to continue to the upper secondary school and follow a program leading to a final examination (*maturita*) which entitles pupils to study at university. In recent years, this process has contained two to three application steps. In some cases, both the certificate from the basic school and the examination held at the school applied were used to decide on admission. Because of the unevenness of school-leaving certificates from the basic school, this process has changed somewhat. The relationship between supply and demand, specifically between school short on applicants and those that are highly competitive and highly selective, varies by locality, prestige, profile, and the changing sizes of birth cohorts. This has also been the case for vocational secondary education. At the end of the last century, around 80 % of pupils were accepted to the 4-year grammar school of their first choice.

Fluctuation in birth rates, inconsistent education planning, and other factors have always led to volatility in applications to upper secondary schools and higher education. Recently, pupils in low-birth years are now attending upper secondary school. As school funding is mainly based on pupil numbers, the lack of prospective pupils is a veritable risk and may well threaten the very existence of some exposed

private schools. In this situation, many upper secondary schools are trying to acquire applicants by offering special programs such as foreign languages, IT, sport, and management, for example. In spring 2013, headteachers of many pupils were telephoning parents promoting their schools and ensuring a place at the school without pupils having to take part in the standard second round of application. One quarter of grammar schools and half of the other secondary schools offered a place without pupils have to take an admission examination. The situation is quite different in the preschool sector and a future rush on secondary schools is to be expected.

12.3.5 Upper Level of Secondary Education

The previous main forms of school at the upper level of secondary education that either offered *maturita* certificates or not have been now formally defined in the Education Act of 2005 as a comprehensive type of school. Although the traditional names have been retained, the new law means that each school can offer any secondary school program. Thus, despite the nomenclature, today's system is seen as a flexible, output-oriented education and training system based on school-based self-determination. In the dual system of apprentice training, in-company practical work complements the theoretical part. Secondary school provides the following programs:

- School-based and vocational 2- or 3-year training programs in secondary vocational schools, in a dual or sandwich education system for less demanding professions with or without a vocational proficiency certificate.
- School-based and vocational education with a vocational proficiency certificate in 2-year, but mainly 3-year training programs in secondary vocational schools.
- A 2-year advanced course enables pupils to acquire a vocational proficiency certificate; graduates of the 3-year programs can subsequently acquire the *maturita* in a follow-up course. The vocational proficiency certificate and the *maturita* can be acquired in a 4-year program; under law, all apprentices are regarded as pupils.
- Full-time, school-based programs leading to a double qualification with *maturita* and vocational qualifications are the traditional domain of the technical secondary school. These can be found in 26 vocational groups (industry, commerce, health, handicrafts, industrial professions, etc.).
- The general education grammar school, either in its 8-year long form or as a stand-alone 4-year upper secondary school following on from basic education, has differentiated its educational programs and about 15 % of *maturita* holders finish school with a specialist maturity in foreign languages, natural sciences, or humanities.

12.3.6 Other School Forms, Advanced Training Programs

A special form of vocational education is offered in “conservatories” in 6-year or 8-year programs in music, dance, theater, and song. The dance program begins in

the lower level of secondary education (Year 6); the other programs begin upon completion of basic education. Programs end with a certificate at secondary or postsecondary level, enabling pupils to study the subject at university. The certificate can also be combined with a general education *maturita*. Most secondary school qualifications, either general education or vocational, can be acquired or extended in second-chance programs. In addition, there is a well-established system of part-time and full-time second-chance programs. Secondary schools also offer other higher and specialist programs both in general and vocational tracks.

12.3.7 School-Leaving Certificate

Since the political reform of 1989–1990, discussions have been held on reforming the school-leaving examination, the *maturita*. Initially, a *maturita* organized on an individual school basis was favored – as a contrast to the previous state-controlled central *maturita* – and this was widely implemented. However, as this also made the *maturita* arbitrary and comparisons difficult, decisions were taken to reform the whole system. Although the Ministry of Education was to be responsible for the reform, the plurality, and a certain degree of comparability and standardization, it did not carry out the reform itself. Instead, it commissioned private companies to organize the project. The project, which was delayed again and again, cost over one billion Czech crowns (\$400,000) and was partly subsidized from EU funds. The whole issue of a new central *maturita*, including planning and trials, spanned a total of 14 years and was only implemented nationwide in 2011 – in two varieties: a more demanding and a “lighter” version. Today, the future of this new state *maturita* is uncertain. Since its introduction, around 20 % of pupils each year do not pass the *maturita*.

12.3.8 Special Education Schools

In principle, children and young people with mental and social handicaps are included as much as possible in the regular education system. There are three main forms, each requiring the consent of the parents: (1) individual integration in classes or groups within regular school, with a guarantee that schools have adequate materials and teachers with special pedagogical training and psychological care to manage such integrative education, (2) integration in a special class or group for disadvantaged children and young people within regular school, and (3) special schools for children with severe physical handicaps who need special facilities and care.

After completing basic education, it is also possible for special needs young people to carry out a 1–2-year vocational program at a “practical school” (*praktická škola*). However, this does not lead to a certificate of vocational proficiency. The physically handicapped have the possibility of furthering their education either in regular secondary schools or in some special general education or vocational facilities.

12.3.9 Postsecondary and Tertiary Education

Higher technical schools (*vyšší odborná škola/VOŠ*) were introduced in 1992. Most of them are private facilities. Initially, programs were not conducted on their own premises but in vocational secondary schools; and their own actual status was not clear. This was clarified in 1995 and in 2004 framework regulations standardized (e.g., a uniform duration for programs of 3 years). Since then the VOŠ have been regarded as a fixed component of tertiary education, while at the same time described as “postsecondary facilities” (Eurybase 2007/2008). Higher technical education is still largely provided in the form of special courses in vocational secondary schools, but there are also some dedicated schools. The trend is towards greater integration in the postsecondary sector.

Colleges of higher education and universities (*vysoká škola, Univerzita*) offer 2–3-year bachelor programs, 4-year (sometimes 5–6-year) master programs, and doctorate courses. Currently, 41.8 % of students are studying for their bachelor’s degree, while 30.6 % and 3.1 % are attending master’s and doctorate programs, respectively. The traditional, highly selective nature of higher education was largely retained up until the end of the 1990s. This is best illustrated by the philosophy faculty at the Charles University in Prague, where in 1991, 6,000 students applied for one of the 600 places available. In the meantime, there has been a considerable expansion of student numbers. The proportion of 22-year-olds studying at the university rose from 26 % in 2004 to 34 % in 2008. Admission obstacles to individual universities vary enormously and are significantly higher in public facilities than in private institutions. In 2007, only 67 % of applicants found a place at university compared to 93 % of applicants to private universities (Eurybase 2007/2008).

12.3.10 Transition to University

The transition rate to university (ISCED A5) in 2000 (25 %) was the second lowest of the 25 OECD states who provided information for the study. The Czech Republic found itself slightly ahead of Turkey (21 %) and behind Switzerland (29 %). Meanwhile, according to the same source, the country has overtaken a range of European countries and is comfortably mid-table with a transition rate of 54 % posted for 2010 (Education at a Glance 2010, 2013). This exemplifies the huge expansion that has taken place in just a few years. Whereas in 2002, the country had 35 universities, in 2007 it had 70. This doubling is also attributable to the growing number of private facilities, which, however, only accept few students. The biggest increase in student numbers is largely manifested at public universities.

A general trend can be seen in both the horizontal and vertical diversification in higher education. Because universities enjoy far-reaching autonomy over admission, the strategies they employ range from trying to establish themselves as an elite (specialist) institution, only accepting candidates from specific schools or with high average grades, to accepting as many applicants as possible. Universities often also react to the changing annual nature of demand for places.

The selection process differs not only between individual universities but also between disciplines. For the academic year 2013–2014, the following acceptance rates (in relation to applicants) have been recorded: medicine II, 15.3 % (Prague); law, 24.7 % (Prague) and 40.5 % (Pilsen); philosophy, 27.3 % (Prague), 55.9 % (Brno), and 94.1 % (Ústí na Labem); natural sciences, 65.6 % (Prague); and education, 33.2 % (Prague) and 52.3 (Brno). In some faculties, admission rates have fallen dramatically in the last 5 years (e.g., medicine in Prague), while in others it has risen (e.g., philosophy in Ústí nad Labem). The situation is highly diversified and permits only few generalizations – such as that the more traditional, renowned universities are more selective (with the exception of certain disciplines such as theology) than younger, less well-developed universities and faculties. Moreover, admission rates in engineering and some other applied industrial technologies are usually high.

12.3.11 Higher Education Qualifications

Czech higher education titles are a somewhat complicated affair. It is difficult to form an overall picture: older titles from a variety of phases in Czech history continue to be used in addition to the newer titles. Recent decades have borne witness to numerous changes, new titles, and changes in the requirements for awarding present titles. As the various faculties award their own titles for the respective faculty, there are currently 23 titles, including bachelor, master, engineer, and PhD. In fact there are seven different doctoral degrees. The older “socialist” titles “Candidate of Science” (CSc.) and “Doctor of Science” (Dr. Sc.) correspond largely to an internationally comparable doctorate; however, the Dr. Sc. doctorate from the Academy of Sciences ranks higher than the CSc. A new doctorate – PhDr. – was added, which until about 1980 was usually awarded upon completion of a special thesis and an oral examination. In some cases in the past, this “small doctorate” as it was also known was awarded to persons who, for political reasons, were denied access to the CSc. and the Dr.Sc. However, from roughly the beginning of the 1980s, the title was awarded simply depending on the institution and faculty for the completion of a university program or when completion was graded as “excellent.” Thus, the PhDr. cannot, at least when awarded without regard to specific examination conditions, be compared with the internationally recognized PhD.

12.3.12 University Graduates and Employment

In 2008, graduate unemployment was relatively low, standing a 3.9 %. Since the financial and economic crisis, this has risen to 7.1 %. This is still in the lower part of the scale and nearly in line with the EU average, standing between the extremes of Greece (39.4 %) and Spain (25.3 %) on the one hand and the Netherlands (1 %) on the other. However, the figure is not significantly below the overall employment

rate which stood at 8.6 % in January 2014 (for Prague). Today, only recent graduates have greater opportunities when compared to the overall group of all graduates. While the unemployment rate for fresh graduates in 2009 stood at 3.7 %, it had risen just slightly by 2012 to 4.2 %. As may be expected, differences also arise from faculty to faculty. Generally, graduates from more central, traditional universities enjoy better opportunities than the average.

12.3.13 Teacher Training

A decree passed in October 1945 stipulated that teacher training for all types and tiers of school should take place in education and other university faculties. In 1946, legislation established educational faculties at university, thus demonstrating the significance of academic teacher training. However, following the Communist overthrow, teacher training at primary level was initially transferred to newly created educational grammar schools, and in 1953, education faculties at universities were dissolved. They were replaced by higher educational schools, later called institutes. Only since the early 1960s has teacher training returned to the higher education sector, as originally envisaged by the 1946 Act. Today, training teachers at the primary level of basic education follow a 4-year program of study at an education faculty. Teachers of general education subjects at secondary school usually specialize in two subject in a 5-year program leading to the award of a master's degree. Education faculties comprise disciplines such as education, philosophy, natural sciences, mathematics, physics, and sport. Some education faculties allow students to study just one discipline (especially foreign languages). Teachers of theoretical subjects at vocational secondary schools study their specialism at universities (economics, technology, agriculture, medicine, art). Generally, teaching qualifications can be acquired in addition to a specialism or subsequently in special courses at university.

12.3.14 Pupil Achievement in the PISA Studies

In the 2000 PISA study, the Czech Republic's mean score in reading skills and mathematics ranked it 20th, below the average of all participating countries. Even the top-performing group in the upper quintile was small and below average. In contrast, the country was ranked 11th, a significantly better position, in tests of natural sciences. However, in the 2006 PISA study, the Czech Republic had fallen to 15th in natural sciences. Its positioning in mathematics also fell between 2002 and 2006, and by 2013, it was ranked 23rd (OECD PISA Studies). The continuous fall of the country's ranking in natural sciences, now 32nd, is particularly striking. This is noteworthy not least because in mathematics and natural sciences the country had traditionally performed well to very well (Váři 1997; Roth 2006).

Although these ranking systems are not directly comparable for a number of reasons and despite the various criticisms lodged at PISA, it is at least symptomatic

that many countries cannot keep up with the competition in the upper level of high performers and that some newcomers are capable of climbing the ladder, while other countries either stagnate or fall back. The degree to which PISA results are a reflection of educational quality is open to debate. No matter how differentiated analyses of the PISA results may be, they are still limited and normative constructs. Although they may increasingly expand the number and sophistication of items and calculation theories, they still blend out international, intersocial, intersystem, and intercultural factors and may in fact run counter to them.

12.4 Developments in the Current School System

12.4.1 Educational Diversity

The various types of private schools that have emerged since the beginning of the 1990 are central to generating and securing educational diversity, although they are inconsistent in terms of quality and, in part, fulfill a variety of functions. In addition to regular attendance at school, there are also home lessons (*domáci škola*), supervised by two Christian schools, the Protestant school J.A. Komenský in Liberec and the School of the Bohemian Brothers (*bratřská škola*) in Brno. These assess pupils' knowledge twice a year in oral and written tests, provide parents and children assistance in educational matters and learning methods, and enable them to participate in extracurricular activities at school.

In the regular school system, there is a range of, partly experimental, variety in education, with diverse emphases. Around 90 (as per 2005) basic education schools are working as "health-promoting" schools as part of an EU project, for example. In 1996, the Ministry accredited Waldorf school programs, and in 1998, Montessori programs at selected public schools. Although this special accreditation has since expired, schools are still entitled to deploy elements of Waldorf and Montessori methodology. A few schools are also working within the framework of the general national curriculum in line with elements of the Jena or the Dalton plans.

A central feature of recent reforms has been the comprehensive change in the principles, the content, and the form of lessons. The core of this reform has been the elaboration of a new framework curriculum where individual schools can set the own specification and focal points. The schools are required to compile their own education program, describing their various characteristics, their educational and contextual focus, their specific curricular variations on the national curriculum, the principles of assessing pupils, and the results and consequences of self-evaluation. Some of the details of the curriculum include a description of the teaching staff, especially with respect to their qualifications; the school's long-term projects concerning national and international partnerships, for example; the overall collaborative work with parents and the school's immediate public; educational goals; special measures to develop key skills in pupils; syllabi and timetables including other specified details with reference to the national curriculum; the assessment of pupil performance; and the principles, methods criteria, and aims of self-evaluation.

Headteachers at primary and lower secondary level have to ensure that children are cared for while attending the school. Normally, this also includes providing an educational advisor and a teacher for preventative education who can work together with the class tutor. Care can also be provided by a school psychologist or a special needs teacher. Educational advice may cover preventing truancy, supporting specially gifted children, drawing up and implementing measures to counter undesirable social behavior (drugs, violence, bullying, etc.), further education and vocational opportunities (since 2002, career guidance is an obligatory element of basic education), and integrating handicapped children at school. Where applicable, the school may work together with external educational and psychological advisory services and with the Centre for Special Needs Education.

12.5 New Developments

12.5.1 Liberalization Versus Governance

The principles of the Czech education system largely approximate to that of other EU countries. This is due in part to the dynamics of EU educational policy, in part also the ideology of global liberalization. Both of these have resulted in a simultaneous mixture of homogenization on the one hand and a vehement diversification of educational models, school-based profiles and organizations, performance differences between schools, and educational behavior of the various social classes on the other. Today, there are glaring differences in regional performance in school-leaving, *maturita*, examinations. Surprisingly, these differences do not follow any consistent social and regional pattern, at least not identified empirically, for example, and town/country pattern. The best foreign language results, for instance, are not found where one might expect to find them, in the towns and cities, but in some small towns and rural areas.

The private school and higher education sectors are also highly diversified. Maintaining bodies of all types of non-state schools including vocational secondary schools and academies include private individuals, foundations, large business enterprises, and religious communities. Prague and other larger cities accommodate a range of schools where English, German, French, and other languages are the language of instruction. They are usually also open to Czech children. Some schools, especially vocational schools, are dedicated to a more international clientele. Key players in the private academy and university sector come from the USA, the UK, and Germany. The quality of these private educational facilities varies. Some universities offer programs, also continuous training programs for professionals, in business and management, targeting aspiring managers. Some private upper secondary schools are ranked in upper mid-table, a few others at the top. However, state grammar schools head league tables of schools. In 2011, when the new central school-leaving certificate, the *státní maturita*, was introduced, the grammar school (*První obnovené reálné gymnasium, PORG*, founded in 1990) clearly headed the league table of grammar schools. The Archbishop Gymnasium in

Prague and the Cyrill-and-Methoděj-Gymnasium in Brno were also among the top-ten schools. There was only one private school (ranked fifth) among the top-ten vocational grammar schools (SOŠ) based on final results. At the top of this group was the public Waldorf Lyceum, maintained by the City of Prague, but which follows Waldorf school principles (novinky.cz 23 June 2011). The prominent private grammar school PORG, mentioned above – with its headteacher Václav Klaus Jr., the son of the former President of the Czech Republic – recently hit the headlines, when a dispute arose between Klaus and the school's most important donor, one of the country's new industrial tycoons concerning their different educational (and also political) views. A fundamental difference related to the respective emphasis afforded to academic knowledge on the one hand and a stronger emphasis on communicative and social skills on the other hand, a contrast that was reflected in various opinions regarding pupil admission and the selection of teaching staff. At times, it was speculated that Klaus would take over a younger competitive school financed by another business tycoon and the country's richest man, Petr Kellner. The backgrounds of top private and Church schools show that, although ambitious funding and special commitment are not the only criteria, they are crucial to achieving and defending this position. On the other hand, these institutions could be susceptible to the personal ambition, animosity, disputes, and competition among maintaining parties than state schools.

In terms of educational policy, the last decade has been characterized by a myriad of new, detailed provisions. The urgency regarding some “key issues” called for in discussions among educationalists is, however, in marked contrast to the reforms actually implemented. A number of larger projects have fizzled out or were lost in the maelstrom of politically “more important” events, a reflection of the weak position of education in real politics. But without doubt, the educational policy in the last 20 years has manifested significant problems with evidence of neglect, in addition to its positive developments. The liberalization of Conservative politics has not only delivered diversification, a commitment to education, and courage to experiment in schools, but it is also partly responsible for the chaotic developments and the lack of planning. Traditionally, the Social Democratic Party, which took over the Ministry of Education following the recent change of government, tends to adopt greater centralization and state control and occasionally has plans that can hardly be funded. Although election campaigns are full of pledges from all parties prioritizing education and schooling, again, however, coalition negotiations conducted at the end of 2013 that describe the tasks of the new governments, in contrast to all other departments, only issued a non-binding declaration to offer “comprehensive support for education.” Above all, the “large” and expensive reform of the *maturita* languished; and it is not clear whether the reform of the central *maturita* will continue or not.

In the meantime, the new minister has a least established vocal presence, calling his preliminary main points a reorientation: eliminating the previous “chaos and volatility of proposals and measures”; a new state commitment to renewing the expansion of the preschool system; the systematic management of funds at regional and municipal level, also with respect to the labor market; renewing support for an

obligatory core to the *maturita* examination (e.g., a mandatory examination in mathematics); introducing a systematic career development plan for teachers; and, interestingly, expressing an intention to introduce a compulsory third lesson per week for sports.

12.5.2 The Situation Regarding the Roma

A particular challenge for the education system is the situation regarding the Roma population. Today, this is made up mainly of various waves of migration that have taken place since World War II. The indigenous Sinti population was nearly fully decimated under Nazi occupation. In 2007, the Czech Republic was criticized by the European Court of Law for practicing “indirect discrimination” by placing a disproportionate number of Roma children in special schools. Despite this, a recent study has revealed that today, still around 35 % of special needs pupils are Roma children (Rameš 2013). On the other hand, for decades, the various regimes and governments have constantly been discussing how best to offer schooling to the Roma population, an undertaking that is by no means easy. As early as 1960, about two-thirds of the Roma population were attending school, the majority of which however without completing the regular basic education up to Year 9. Some Roma even then attended secondary school and university. By 1970, 10 years later, the proportion of Roma attending school had risen to just below 90 %. In the meantime, general school attendance has become a normal aspect of life for Roma children, even if this is partially coupled with truancy and attendance in special schools. A recent report published by the EU Commission covering 11 EU countries highlighted the Czech Republic as the country with the highest level of education among the Roma population. At 40 %, even participation on the labor market is relatively high, compared with the 10–20 % found for other countries. The proportion of Roma with a secondary school education amounts to 30 %, compared to an EU average of 15 % (Pilař 2013).

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P. Rasmussen (✉)
University of Aalborg, Aalborg, Denmark

T. Werler
Bergen University College, Bergen, Norway

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13.1 History and Social Parameters of the Education System

The notion of the so-called life enlightenment (*livsoplysning*) and the concepts elaborated by N. F. S. Grundtvig and his work on residential adult education centers form the fundamental principles of the Danish school system. A significant goal of Danish education is not just the acquisition of theoretical knowledge, but the acquisition of practical knowledge that provides an explanation of and orientation in life.

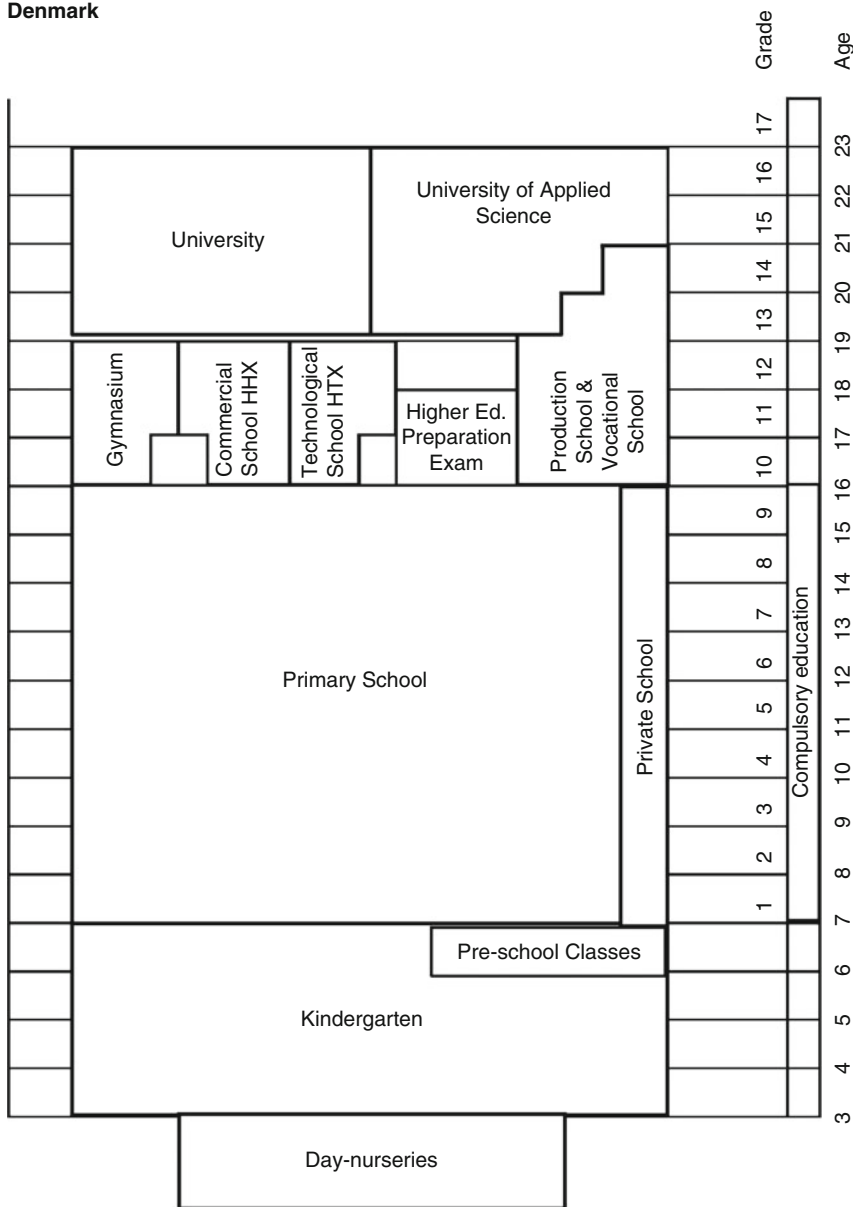
As with all Scandinavian countries, both the length and scope of institutionalized education developed after the Second World War. The multitrack school system which was largely abolished in 1903 was replaced by a comprehensive school model. Based on the experience of the war, special value was given to strengthening democracy through school education. In addition, cooperation between parents and school was improved and preschool care established.

Within this comprehensive general connection, reforms have recently been carried out across the whole of the education system. Guidelines for reform are provided by the government, which is typical for a centralist nation such as Denmark. These include the modernization of the curriculum, the freedom of individual institutions, and an effective control process over funding. Decentralization has given decision-makers at institutional level considerably more local autonomy. Local bodies and the individual institutions are responsible for implementing the framework aims defined centrally, but it is becoming increasingly important to meet national standards. Alongside preschool facilities, the *folkeskole* (a 9-year primary school) form the core of the Danish school system. In addition to schools that prepare pupils for university, there are numerous other secondary schools both in the public and in the private sector.

13.1.1 Reform and Innovation

In the course of the twentieth century, the various parts of the whole Danish education system were gradually taken out of a local context and transferred to a system of its own. By and large, the connection between the individual types of school (*folkeskole*, basic school; *realskole*, secondary modern school; *gymnasium*, grammar school) was achieved in the middle of the twentieth century with the school reform of 1958. These developments were directly related to the changes in the social structure, increasing urbanization and growth in population. Triggered by industrialization and following on from the modernization of society, an ever-growing proportion of the population needed more educational opportunities and qualifications.

Denmark



The fact that a school was an instrument of social division characterizes the expansion of schooltime and extended access to secondary education. The development of the comprehensive school culminated in the course of the 1970s and 1980s. The Danish policy toward education and educational activities largely eliminated the differences that had arisen between urban and rural schools

and between social groups. The process of external unification led to internal differentiation (through specialist courses).

In the mid-1970s, the radical movement of resistance against the Social Democratic-dominated welfare state developed. Parliamentary power shifted, and the conservative and liberal parties emerged stronger from election campaigns. Neoliberal tendencies in education intensified when Bertel Haarder took office as the education minister in 1984. Haarder distanced himself from the notion of interdisciplinary study and educational reform, diluting the aims of social equality and instead emphasizing flexibility and mobility. Parallel to this, attempts were made to push ahead with the decentralization of the school sector through the use of market mechanisms.

In 1993, the Social Democratic government passed a new *folkeskole* law that strengthened the notion of decentralization, giving more power to head teachers. In a bid to raise performance levels, more class time was allocated to key subjects. The option of dividing pupils into classes of varying ability levels was abolished, the aim being to provide greater flexibility to offering differentiation within classes. The law was characterized by performance-oriented and reform impetuses. The Social Democratic/Liberal government renewed the law in 2013. The reform means that key subjects such as Danish and mathematics and also creative subjects were allocated more class time. In addition, the law aimed to strengthen the connection between class time and organized leisure activities. As a result, “activity lessons” outside the normal schooltime were introduced: this gave pupils the opportunity to receive help with their homework. These activity lessons were supervised by preschool teachers in collaboration with class teachers.

13.1.2 Political, Economic, and Cultural Conditions of the Current Education System

The twentieth century witnessed a shift in economic focus in Denmark from an agricultural society to a service society. However, the transformation process was also clearly characterized by the increased deployment of industrialized methods in agricultural produce. But Denmark has too few natural resources to base its economic prosperity on in the long term. Research-based high tech and an expansion of the public sector mark the current labor and cultural pattern in the country.

In contrast to the other Scandinavian countries, Denmark with its 5.6 million inhabitants, 2.7 million of whom are in employment, is relatively densely populated. The total land area amounts to 43,000 km². Roughly 60 % of land space is used for agriculture, but given the strong streamlining measures, only 4.8 % of the population works in the farming sector. An important economic sector is the fishing industry. Denmark changed from an agrarian to an industrialized nation during the 1960s. About 20 % of the employed persons are active in the industry, while 66 % work in the service sector. The high export potential for the Danish industry is secured by a concentration on modern production and research technologies and a highly trained workforce. In 2007, the unemployment rate was 3.4 %, in 2013, 6.8 %. In 2008, the gross national product amounted to 252 billion euros. With the expansion of the

welfare state, the expenditure on education climbed from 2 % of GNP in the 1950s to 15 % in the 1990s. The expenditure continues to remain at this level.

In addition to the number of immigrants and their families (606,000), a German minority lives in the south of the country. The relative homogeneity of the population has meant that the Danish society is able quickly to find compromises and various forms of consensus when it comes to social, economic, and even cultural issues. The Danish welfare state was built up in the 1950s and has proven to be relatively stable.

The Danish state has a long democratic tradition; the monarchy was reformed in 1849 through the introduction of a liberal constitution and the *Folketing* (parliament). The queen heads the constitutional monarchy; in reality, the executive is made up of the ministries and the central administration. The *Folketing* is the legislative.

Denmark is made up of 5 regions and 98 municipalities. The kingdom of Denmark also includes the autonomous territories of Greenland (57,000 inhabitants) and the Faeroe Islands (50,000 inhabitants). The church and the state are not separated; in 2013, 79 % of the population belonged to the *Folkekirken* (the people's church). Nevertheless, the Danes are not very religious people.

13.2 Fundamentals, Organization, and Governance of the Education System

13.2.1 General Principles, Current Educational Policy, and Goals of the Education System

The educational policy in Denmark is not only a reflection of the character of Danish society, but also of its national political system and its culture. The political culture of the country is characterized by cooperation and pluralism at both national and local levels. This has been manifested in various comparative studies (e.g., Skidmore and Bound 2008). This development is all the more remarkable because Denmark experienced the transition from absolutism to democracy without any noteworthy conflict. As a result, coalition governments are more the rule than the exception in the twentieth century. The majority of governments have been formed by the Social Democratic Party in cooperation with the Liberal Party. The current government which has been in office since 2011 is a Social Democratic-Socialist-Liberal coalition.

Traditionally, Danish politics emphasizes the welfare state, in particular within the meaning of a universal distribution of social goods and services, and its labor market is set up accordingly. Organized employees and employers form the backbone of a working atmosphere characterized by consensus and cooperation. Trade unions have secured widely valid agreements. The state also plays an active role by undertaking political activities to intervene in the labor market. The collaboration between social partners and the state is a major feature of the development of both vocational education and a range of activities preparing young people for the labor market. Although this political element has been weakened in the past through a policy of deregulation, it still plays a significant role even in comparison with other European countries.

Denmark has been a member of the European Union since 1973. Its membership is mainly based on the opinion that a small country cannot survive alone in a world dominated by transnational blocks and be economically dependent on these. However, this membership was, and still is, contentious. EU membership has brought about the internationalization of the Danish education system, which is particularly stark in the areas of lifelong learning, e-learning, and vocational education. Although the Bologna Process is not necessarily tied to the EU, it has still led to widespread changes in the higher education landscape.

13.2.2 Basic Legal Principles of the Education System

The Danish school system today displays a high degree of financial decentralization. The same cannot be said for decisions about local curricula and specific content for which central committees (ministries) are responsible. Governance is exercised on the one hand by the national curriculum and the objectives it contains and, on the other hand, indirectly by national examinations and tests.

The law on basic schools¹ forms the legal framework for education at public Danish schools. Lessons at a free school (*friskole*) or at a private school are regulated by the law on free schools and private basic schools.² Secondary education at *gymnasium*, grammar school, is determined by the law on secondary schools³; the law on education for the preparatory examination defines the framework conditions for *hf* courses (Higher Education Preparing Exam).⁴ Vocational channels at the upper secondary level are determined by the law on higher commercial examinations (HHX) and higher technical examinations (HTX).⁵ Legal provisions governing fundamental vocational education are found in the law on vocational education.⁶ Numerous implementing provisions, addenda, and adaptations of the legal framework are carried out regularly. All universities and other institutions of higher education, their administration, and research work are subject to the University Act of 2006.⁷

13.2.3 Managing the Education System

The *Undervisningsministeriet* (Ministry of Education, UVM) has the legislative responsibility for the education system, with the exception of university programs. The Ministry is divided into a division of educational policy and a division for

¹Lov om folkeskolen

²Lov om friskoler og private grundskoler

³Lov om uddannelsen til studentereksamen (stx)

⁴Lov om uddannelsen til højere forberedelseksamen (hf)

⁵Lov om uddannelserne til højere handelseksamen (hhx) og højere teknisk eksamen (htx)

⁶Lov om erhvervsuddannelser

⁷Lov om universiteter (universitetsloven), 2006

quality and supervision. While the former is responsible for implementing policy decisions in education, the latter is responsible for monitoring the various educational institutions and programs.

The *Undervisningsministerium* determines the other basic conditions for the *folkeskole* as well as for the *friskole* (free school). These include the general aims of the school, the curriculum, and single subjects through national standards. The fundamental character of the public school is determined by the core curriculum and a guideline for the timetable. At the upper secondary level (*gymnasium*, *hf-line*, *HHX* (trade school), *HTX* (technical secondary school)), the Ministry develops the regulations for the curriculum and for the final examinations. It also approves new subjects and compiles written final exams; the *Undervisningsministerium* also supervises lessons and exams. The Ministry regulates vocational education in conjunction with partners on the labor market. A committee has been set up for each discipline comprising employer representatives and representatives from trade unions and the Ministry. The committees are responsible for the respective curricula.

The following agencies are involved in the local administration and operation of the *folkeskole*:

- The *kommunalbestyrelse* (district council) is responsible for the distribution of financial resources, for appointing teachers, and for opening/closing schools.
- The *skolebestyrelse* (school board) is made up of parent representatives, teachers, and pupils and draws up the local curriculum.
- The *pædagogisk råd* (a consulting committee of teachers), to which every teacher automatically belongs.

All secondary schools, vocational education facilities, and adult education facilities are legal institutions in Denmark that exercise their activities in line with national regulations. Because many district authorities were disbanded as a result of the reform of municipalities in 2006, most upper secondary schools carry out planning and administrative tasks themselves. The head teacher and the school board are responsible for the provision of education, subjects, the use of the state subsidy, examinations, decisions on the hiring of teachers, and acquiring and/or equipping school buildings.

The autonomy of the local school is expressed in the free selection of textbooks and all other teaching aids which are not subject to state approval. The *skolebestyrelse* is responsible for the selection, but every teacher is free to decide on their use in his or her class. They are also free to apply the methodology of their preference. The *Folketing* and the *Undervisningsministerium* determine teaching objectives and set national standards which must be fulfilled by the schools.

13.2.4 Funding the Education System

The *folkeskole* is funded by the municipalities through local taxes. However, the use of resources for the basic school is regulated and controlled by the state which effectively restricts the financial leeway of the municipalities. Attendance at private schools is

subject to cost, which parents have to cover 15 % of fees themselves. All other costs are financed by the state. Secondary schools and adult education are largely funded from state funds. Some public adult educational programs are subject to fees.

Formally, universities and other institutes of higher education are legal bodies whose programs are virtually fully financed from state funds. They are entitled to charge for further education programs, but even these are largely cofinanced from state funds. Research activities at the university are also state financed, but are increasingly supported from private sources.

At the beginning of the 1990s, the “taximeter principle,” an activity-based system of funding, was introduced in Denmark and applies to the *friskole*, general and vocational education schools (*gymnasia*, *hf-kurs*, *HHX*, *HTX*), the tertiary sector, and adult education. It does not apply to the state-run *folkeskole*. It consists of a lump sum (*grundtilskud*), a pupil-related amount (*uddannelsestakst*), and a combination of funds to cover administration and operating costs (*fellestakst* and *bygningstakst*).

13.2.5 Relationship Between the Public and Private Sector

Private *friskoler* (open schools) have existed in Denmark since the middle of the nineteenth century. These are founded on the tradition of compulsory education because Denmark does not have compulsory schooling. Parents have the constitutional right to teach their children at home. The free private primary schools have a similar structure to public schools. Parents can freely choose the school form attended by their children. They decide both on the educational type and the structure of the school and on the form, contents, and amount of teaching. However, they have to pursue the same objectives as the *folkeskole*, and pupils have to take the same examinations. The *friskole* mainly provides education equivalent to the 9-/10-year *folkeskole*, and the secondary sector and their educational focus vary enormously. Denmark has about 530 *friskoler* spread throughout the country. The private schools are small with numbers varying between 28 and 450, and they are attended by around 14 % (2011) of an age cohort.

The state supports private schools by covering 85 % of the costs with the rest being covered by tuition fees. A parents’ representative supervises the lessons to ensure that the teaching is of the same standard as in state schools.

13.2.6 System of Quality Development

In the mid-1980s, the education minister of the time, Bertel Haarder, undertook a variety of initiatives to establish the issue of “quality” at all levels of the education system. Since then, the issue enjoys a fixed place in Danish education politics and is always at the center of important political decisions. The triumph of the concept of quality was accompanied by the establishment and continued development of quality assurance systems at all levels which involved the creation of special institutions and procedures. One of the first institutions to be established was the Danish Centre for

Quality Development and Assessment, founded in 1992, whose prime task lies in monitoring higher education. Funded by the Ministry of Education, the center repeatedly carries out quality tests on all academic study programs. The center was reformed in 1999 to become the Danish Evaluation Institute (EVA), and while its organization and methodologies remained largely the same, its scope was expanded. Since then, its central responsibility focuses on the quality control of all areas and sectors of the Danish education system. In particular, it explores strategically significant elements, and the institute provides political consultancy on the basis of its evaluation.

As an instrument of quality assurance, the accreditation of secondary education services was introduced. Before they can be offered, new services have to be accredited, and services that have already been established are to be assessed on a regular basis. Decisions on accreditation are made by the Accreditation Council (*Akkrediteringsrådet*). University programs are accredited by the ACE Denmark (Danish Accreditation Institution). All other services are accredited by the EVA.

At the level of the *folkeskole*, a nationwide program of quality development and assurance (*kvalitetsudvikling i folkeskolen*) began in 1998. It is carried out on the national, local, school, and class level. Municipal aims and evaluation methods had to be compiled, and schools had to be able to work with evaluation and quality assurance instruments. As a supplement to the school reform of 2006, a committee was created to evaluate and develop quality in schools. At the same time, a resolution was passed stipulating that each municipality should submit an annual quality report containing administrative and educational details. A quality assurance program for vocational education was introduced as early as 1997.

13.3 Overview of the Structure of the Education System

The Danish education system developed along the paradigm of cooperation and conflict between political interests. The parties are constantly trying to achieve a consensus in terms of the design of the education system, and reforms were never radical. Unlike the other Scandinavian countries, Denmark provides a variety of educational channels at the upper level of secondary education. In principle, general education, technical, business, and other specialist secondary schools can be selected. From time to time, effort was made to achieve greater harmony within secondary education, but such attempts rarely met with success. The division of the upper level of secondary education reflects the divided political interests in the country. While liberal and conservative powers are interested in retaining the quality of the *gymnasiet*, the grammar schools, the Social Democratic Party is more concerned with expanding and improving the status of vocational schools. Most varieties of vocational education are based on a dual, or block, system. Traditionally, all social partners, i.e., trade unions and employers, are included in the development of vocational education. Adult education in Denmark is rooted in the enlightenment and mass education movement (*folkeopplysning*) of the nineteenth century, initiated by N. F. S. Grundtvig.

The Danish education system can be expressed in numbers as follows: In 2012, there were about 1,300 state primary schools (*folkeskole*) and around 800 private

schools, including *friskoler* and *efterskole*. At the level of ISCED 2 were a total of 712,000 pupils, of which 566,000 attended *folkeskole*, 102,000 to *friskole*, and 24,000 to *efterskole*. The average class size at *folkeskole* was 21.1. There were also about 150 secondary schools. It is virtually impossible to give a precise number of vocational schools given that these are constantly merging.

13.3.1 Nursery School

The first institutions of preschool education in Denmark were set up in 1820. Reforms in the social system initiated at the beginning of the twentieth century gave the state – and since 1987 the municipalities – financial and educational responsibility.

In day nurseries (*vuggestue*), children up to 3 years of age and, in the following kindergarten (*børnehaver*), children from the ages of 3 to 7 are educated. In order to negotiate the transition from the exploratory and playful program of the preschool institutions to the *folkeskole*, 1-year preschool classes (*børnehavsklasser*) were established for 5–7 year olds. Approximately, 95 % of all children of an age cohort attend preschool classes that prepare children for the *folkeskole*. The Education Act was revised in 2008; the *børnehaveklasse* is compulsory for all children from 2009. This extends compulsory education to 10 years. There are also numerous mixed-age institutions (*integreerede institutioner*) which cater for children from the preschool age up to the age of 14.

13.3.2 Primary/Lower Secondary School (Folkeskole)

Unlike numerous other European countries, Denmark does not have compulsory school attendance. Parents are merely obliged to ensure that their children receive at least 9 years of education in line with the core curriculum. Children may attend lessons at the public *folkeskole* or at other institutions (*friskole* or private lessons at home), whose programs comply with national standards. Compulsory education begins at the age of 6 and lasts for 10 years, ending at the age of 16. The *folkeskole* (9-year primary school) is the public state school providing primary and secondary education. The same applies to the corresponding services provided by the *friskole*.

The *folkeskole* is the public school. The *folkeskole* is a coeducational comprehensive school open to all pupils. It is free of charge, including study materials.

No marks are given between Year 1 and Year 7. Schools are obliged to report to parents on the pupil's progress at least twice a year. Every pupil has the right to decide on his/her own curriculum which defines content and aims targeted in all subjects. Since 2008, tests are carried out across the country each year in selected subjects and for selected school years. The tests are prepared and organized centrally by the Ministry of Education. Teachers receive information on the results for individual pupils and are supposed to inform pupils of this in writing. However, no marks are awarded.

Marks are given from Year 8 to Year 10 through final exams (*bevis for folkeskolens afgangsprøve*) in Danish, English, religious education (Christianity studies), history, social studies, mathematics, geography, biology, physics/chemistry, German, French, art, handiwork, domestic science and home economics, and woodwork. Written tests are the same for all schools and are centrally organized by the educational department as are the criteria required for assessing the work. Oral exams are held by the teachers in the presence of a teacher of another school (*censor*).

Compulsory education can take place at home or by visiting an *efterskole* (after-school). It is possible for Danish parents to teach their children themselves at home, but they have to inform the municipality of their decision. The district council can set exams in mathematics, Danish, and English to supervise the teaching and learning and to ensure that their respective levels correspond to the standards of the *folkeskole*. The *efterskole* is one of the private open schools. It is a boarding school for young people between 14 and 18 years of age. Pupils can spend Year 9 and Year 10 at such an institution as an alternative to the *folkeskole*.

13.3.3 Upper Secondary Education

There are three types of school, which cater to 94 % of an age cohort of *folkeskole* graduates. About 20 % of the young people continue education in vocational education. Education at the upper secondary level is subdivided into two main types, both of which lead to university entrance entitlement: 3-year upper secondary schools (*gymnasium*) and the university preparation route (*højere forberedelseseksamen, hf-line/hf-kurs*) as preparation for entrance into higher education. This accounts for about 55 % of an age cohort. The 3-year program leads to a double qualification at commercial schools (*højere handelseksamen, HHX*) and technological schools (*højere teknisk eksamen, HTX*). These accommodate roughly 20 % of an age cohort.

13.3.4 Upper Secondary School (Gymnasier)

The coeducational *gymnasier* offers general education for 16–19-year-old pupils. It is completed with the *studentereksamen* (student exam). Education at public schools is free of charge; pupils only have to buy learning materials (except textbooks). Pupils who have finished Year 10 of a *folkeskole* may complete *gymnasium* through a 2-year course (*studenterkurser*). Lessons here can also take place in the evening. In principle, pupils who have completed Year 9 can be accepted in the program to prepare them for university study. Generally speaking, the majority of applicants are accepted at their chosen school; applicants may sometimes have to take an entrance exam.

Pupils are divided into school year groups and taught by specialist teachers. The secondary school was divided into a language and into a

mathematical-natural-scientific track, but this division was ended in the latest reform of 2005. Lessons are made up of obligatory subjects and some options in three levels. Mandatory subjects include Danish, English, history, classics, physics and physical education, mathematics, religious education, social studies, chemistry, and geography. On top of this, pupils have to study two foreign languages, an art subject, and a natural science. In addition, there are numerous options studied for a limited period of time.

The final examination, the *studentereksamen*, consists of a series of individual subject exams spread across the second and third year of secondary school. The written exams are set centrally by the Ministry. The Ministry also determines which pupils are to be assessed in what subjects. The final mark is determined by the result of the examination and the achievement in the subjects in the course of the school year. About 17 % of pupils who start secondary school leave prematurely without passing their final exam. As a rule, the subject teachers at secondary schools have degrees in at least two subjects. After academic studies, teacher trainees undertake a 6-month phase of theoretical and practical education (*pedagogikum*). These courses are accompanied by teaching practice at a secondary school or an hf-line.

13.3.5 The hf-Line

The *hf-line* system, introduced in 1967, arose from the political desire for the extensive participation of broad population groups in education. After completing Year 10 of the *folkeskole*, pupils can participate in 2-year university preparation courses leading to the general university entrance entitlement. The *hf-line* system is especially attractive for young adults who could not attend secondary school for social or personal reasons. The hf-line system broadens the circle of pupils who might wish to study at a university. While at the secondary school, one finds an overrepresentation of children from the middle and higher social classes; pupils in the *hf-line* are drawn from a wider circle of society.

The courses are organized either as full time or as evening classes in secondary schools or in local adult education facilities.

Pupils are divided into course levels, and their curriculum consists of common core areas and three electives. The range of subjects and education are much the same as at *gymnasium*, and teachers have similar qualifications. The *bevis for højere forberedelseseksamen* (certificate of higher preparation exam) is awarded after the successful completion of oral and written exams. Roughly 25 % of pupils who begin the *hf-line* program leave school prematurely.

13.3.6 HHX and HTX

Attached to the *folkeskole* as part of secondary education are 3–4-year programs leading to a double qualification, called “grammar school professional”

(*erhvervs-gymnasiale uddannelser*). A basic vocational education which ends with the *højere teknisk eksamen (HTX)* or the *højere handelseksamen (HHX)* qualification is also offered. There is an exam at the end of these full-time courses, and both tracks lead to a certificate for a professional qualification and university entrance entitlement.

The *HTX* qualification can be obtained at technical secondary schools, the *HHX* qualification at commercial secondary schools. The *HHX* and *HTX* tracks usually last for 3 years. In the first year, both tracks offer a general educational program. The last 2 years cover more specific vocational courses. The two tracks follow theories and methods applicable to vocational education supplemented by a practical environment. Pupils do not pay tuition fees.

The *HHX* program contains the following compulsory subjects: Danish, English, a second foreign language, economics, and special subjects such as trade, information technology, international economics, and commercial law. The program also contains special vocational education programs such as project work and optional subjects such as mathematics, foreign language, cultural studies, design, media, psychology, environmental education, economics, and EU cooperation. These subjects are offered at three different levels. About 20 % of pupils who begin the *HHX* track leave school prematurely.

The *HTX* program, which appeals to young people with scientific or technical interests, was introduced in 1982. It includes a number of compulsory subjects: technology, mathematics, physics, chemistry, biology, Danish, English, a second foreign language (German or French), and social studies. Optional subjects are mathematics, foreign languages, cultural studies, design, media psychology, environmental studies, and EU cooperation. About 40–55 % of these subjects can be chosen by the pupils. Specialization is achieved through the choice of technical subjects: construction and energy, design and production, services and communication, process management, nutrition, nature, and agriculture. About 27 % of pupils who begin the *HHX* track leave school prematurely.

13.3.7 Vocational Education

Most vocational programs take place over a period of 3–4 years. Basic vocational education is carried out through a dual system at vocational schools (50–70 %) and in the workplace (30–50 %). The enterprises and their trainees sign an education contract. As an alternative, schools also offer vocational education for trainees who have not received a contract with an enterprise. The objective of the vocational education programs is the theoretical and practical training of young people for the labor market.

In 2000, the structure of basic vocational education changed as part of a reform program (*eud-reform*). The result is a simplified structure and a more flexible organization. The reform reduced the former 85 professional groups to much more basic vocational programs. At present, there are twelve basic vocational programs:

- Cars, aircraft, and other means of transport
- Building and construction
- Facility and consumer services
- Flora, fauna, and nature
- Body and style
- Food for people
- Media production
- Trade and business
- Production and development
- Energy, controls, and IT
- Health, care, and education
- Transport and logistics

At the end of the basic vocational program, pupils can choose numerous disciplines in their main course. At present, there are 108 disciplines with 299 levels or specialisms.

Training at work dominates vocational education. The transfer of knowledge in Danish vocational education always builds on practical experience. This is seen as a component of skill building that can be applied directly in everyday working life. Because the professional orientation is so strong, efforts are always being made to harmonize basic vocational education with the rest of the program.

In doing so, one of the aims was to encourage more young people to complete their vocational education successfully. Although there is great demand for this type of training, drop-out rates are high. About 55 % of pupils that start vocational education finish prematurely without a proper qualification. Several studies have documented that one of the main causes for this lies in limiting the number of apprenticeships and/or places available in secondary vocational education. But other factors may also be the loss of motivation and the lack of social and cultural activities at vocational schools. A second aim was to teach the skills that are in demand. Flexibility, learning capabilities, and personal skills are becoming increasingly important, and vocational education also has to be preparing for these. A third aim is to increase the status of vocational education. Young Danish people and their parents have developed a hierarchical view of secondary education, with the academic channel according a higher status than vocational education.

One of the aims of the vocational education reform of 2000 was to place greater focus on educational aspects in professional training. Also, one of the most significant ambitions of the projects was to generate a variety of contexts for learning to take place and to provide for more individual options. This aim reflected the change in educational thinking (from teaching to learning) and is based on the assumption that fewer and fewer young people can identify with the type of working culture that used to characterize the more traditional training of apprentices. This is contested by the vocational schools and unions who argue that the flexibilization and customization of learning space have fragmented the education process, making it obfuscated thereby raising the drop-out risk, not reducing it.

The current government is striving to instigate more initiatives in vocational education. This includes setting up practice centers to ensure that pupils have better access to practical experience.

13.3.8 Higher Education

University programs are distinguished by their length and access criteria, but are generally divided into three levels: short-term (2–3 years), medium-term (3–4 years), and long-term (5 years) courses. The Ministry of Education can limit access to certain programs if this is viewed to make sense or becomes necessary. Access to most courses at the national level is not restricted. However, because of local restrictions on the number of places, students might have to study elsewhere to take the course of their choice. In addition, it is possible to have European Credit Transfer System (ECTS) points transferred from other educational courses; this also applies for some professional experience. Access requirements vary from subject to subject.

Most short-term technical programs build on prior professional education. Many of these programs lead to certificates that qualify people for service professions such as market analyst, bilingual secretaries, or lab assistants.

Medium-term programs lead to qualifications such as engineer, librarian, primary school teachers, journalist, social worker, nurse, midwives, or in positions in business administration. In the last few years, increased efforts have been made to strengthen the knowledge base of professional studies at the various universities. This includes the introduction of a new medium-term “professional bachelor” qualification.

Academic bachelor programs are also medium-term courses, lasting for 3 years. Such programs exist in social sciences and in humanities as well as in the study of natural sciences. Most universities also offer master’s programs. Entry to bachelor programs requires students to have successfully completed the upper level of secondary education, and universities can choose their students based on average marks achieved at school. Although bachelor programs lead to an initial professional qualification, most students stay on to take a master’s degree. These usually last for 2 years. There are master’s programs in all academic areas and in professional training (in teacher training, veterinary sciences, nutritional sciences, and agriculture and forestry).

This current structure of higher education was created by a series of reform that took place in the 1990s. A major step was the introduction of the bachelor’s degree in 1993. At this time, all university programs ran for 5 years and led to a *kandidaten* (master’s) degree. The year 1993 also saw the introduction of postgraduate degrees. Denmark introduced bachelor’s, master’s, and Ph.D. degrees prior to the Bologna declaration.

In the last few years, increased efforts have been made to establish a network of professional studies at the various universities. The recent years have been characterized by tension between professional institutions of higher education that emphasize practical professional interests and universities that promote a purely academic education.

13.3.9 Adult Education

Adult education in Denmark is rooted in the enlightenment and mass education movement (*folkeopplysning*) of the nineteenth century. The traditional core of adult education lies in the *folkehøjskoler* (residential adult education centers) attributable to N. F. S. Grundtvig. These were founded on the basis of the “living word,” i.e., the practiced Danish language. Presently, they offer general education programs for adults and emphasize practical activities. All schools are free to determine their content themselves. In part, they are characterized by regional culture and economic life. One of the traditions of Danish adult education is the numerous educational associations, evening schools, and “open” universities (*folkeuniversitetet*). Teachers here include active researchers who teach academic methodology and results. There are also *daghøjskoler* or adult education centers. Alongside the rapidly expanding labor market-related adult education (*arbejdsmarkedsuddannelser*, AMU), a collaborative project between the state and wage partners, there are education centers (*voksenuddannelsescentre*, VUC) that provide an opportunity to catch up on school qualifications. General adult education (*almen voksenuddannelse*, AVU) is governed by its own act of parliament which divides adult education in Denmark into three sectors:

- *Professional adult education* aims at strengthening skills relevant to the labor market and at providing the necessary qualifications.
- *General adult education* aims at improving general skills and general knowledge in order indirectly to improve the professional skills of the learners.
- *Popular adult education* (residential adult education centers and evening schools) sees its main task in providing personal education for leisure time.

Although various reform initiatives have differentiated this structure, the basic pattern has been retained. Most significantly, it is the balance between the individual sectors that has been shifted. At present, professional adult education programs predominate and are being offered at the level of secondary education as well as at tertiary level. In contrast, the two other sectors are losing their importance somewhat. These changes can be seen as the result of a shift in career orientation of learners.

In 1990, a system of “open adult education” was introduced in Denmark. However, new programs or institutions were not created for this; instead, existing courses (upper level of secondary education, bachelor’s and master’s degree) were offered in modular form for part-time adult learners. Sometimes, course participants had to pay course fees, but the state still covered most of the costs. Since this system of open adult education was introduced, both the offerings and the number of learners have increased continually. As a consequence, the parliament passed the law on continuing adult education in 2000 which led to the creation of study programs and enabled adults to catch up on school and higher education qualifications. Unlike the traditional education system, preparatory courses that convey basic cultural tools are obligatory. An access prerequisite for courses is relevant professional experience.

Each year, about 1.4 million people take part in some form of adult education in Denmark. This is made possible by, among other things, the various aid schemes for educationally active adults.

13.4 Developments in the Current School System

In the recent past, Denmark's education system has been regarded as an element of Danish competitiveness. This is shown on the one hand in the discussion of the performance of Danish pupils in international tests and on the other hand in the debate focusing on the aim that in the foreseeable future the whole population should have an education equivalent to the upper level of secondary education. A significant forum for formulating this educational policy discussion was the so-called Globalization Council that was active in 2005–2006. This council was established by the government; its members were key figures in business and employer associations. The council culminated its work with an influential publication on the reaction to globalization which included the key issue of education. This formed the basis for numerous reform efforts at all level of the education system.

13.4.1 Transition Between Levels of Education

As mentioned above, the Danish government is aiming to ensure that by 2015, 95 % of young people will have an education (either general or vocational) at the upper level of secondary education and that 50 % of an age cohort should have a university degree. In order to be able to follow developments relating to this aim, numerous statistical projections have been compiled that provide information on the educational patterns of coming generations.

Forecasts show that roughly 65 % of young people are intending to begin an upper secondary education (HHX, HTX) and that 30 % will take up a vocational course. It is currently assumed that just fewer than 5 % will never start a program at the upper secondary level. However, it is likely that just 80–85 % of young people will successfully complete their chosen path. A small proportion (4–5 %) will achieve this goal later in life as part of adult education or by having their practical experience recognized. At the end of their formal education, three of four pupils will have a vocational qualification attained either at a vocational school or at a university of applied science. Overall, nearly 15 % of an age cohort will leave the school/training system without any formal qualification. In light of developments since 1990, this means that the proportion of young people with upper secondary school level certificates have risen considerably, while the number of vocational education qualifications has declined. More recent analyses and trends have confirmed that this proportion is continuing to fall (Flagstad 2008).

13.4.2 Dealing with Special Problems

13.4.2.1 The Drop-Out Problem

Current figures show that the governmental goals outlined above will, in all probability, not be reached. The main cause for this does not lie in the motivation of pupils for secondary education, but in the drop-out rate. One of the main tasks of schools therefore has to be to lower this rate. Pupils, who leave the upper secondary *gymnasier*, can quickly find a path back into the system, but the same cannot be said about those pupils leaving vocational education. At present, a number of attempts and campaigns are being carried out to reduce the drop-out rate, but despite the stated intention to reach the target, there are very few signs at the moment that this will be achieved. A key reason for this is the Danish model of organizing the education system (upper secondary education and vocational education) because this traditionally pursues other aims than the current one. Beyond this, relatively stable coalitions of interest are standing in the path of fundamental reforms of both systems. It is possible that the school system's strong focus on effectiveness has a negative impact on the reform capability of the system, with this economic approach restricting a real leeway.

13.4.2.2 The Problem of School Achievement

In the course of the last 10 years, the achievements of Danish pupils in comparison with other countries have been a major political issue. The Programme for International Student Assessment (PISA) study sparked considerable public attention, and its results were used as a reliable political argument, even though Hopmann et al. (2007) were able to show that this is not possible given the measuring instruments and data used. International evaluations (e.g., those of the Organization for Economic Cooperation and Development (OECD)) are playing a greater role in the debate. Whereas in the past discussions concerning the *folkeskole* mainly focused on establishing a secure learning environment and on the social education of pupils, present performance levels of both pupils and teachers in core subjects such as Danish, mathematics, and foreign languages are being emphasized. A recent study showed that the positive attitude of pupils toward school-based learning and teaching is being jeopardized by the strong focus on achievement (Osborn et al. 2003).

13.4.3 Measures to Integrate Pupils from Immigrant Families

Immigrants and their families make up 10.4 % of the Danish population. In comparison with many other countries, this may be a modest figure, but immigration is a controversial political issue in Denmark. Current regulations are strikingly restrictive and focus on the integration of immigrants in the Danish culture. This applies in particular to immigrants with a Muslim cultural background. A possible explanation for these effects could lie in the traditional ethnic homogeneity and the resulting cultural integrity.

A key political issue is therefore that of language; in the face of research suggesting that mother tongue lessons can be necessary to learn a new language (here Danish), the government decided in 2002 to do away with mother tongue lessons for bilingual pupils. The argument was that resources should be concentrated stronger on the Danish teaching of bilingual pupils at the beginning of schooling. This decision was a representative of a whole series of similar measures undertaken to achieve greater integration in “being Danish.”

In terms of school achievement, immigrants and their children perform significantly less well than Danish pupils. Pupils from non-Western backgrounds achieve significantly less well in reading, mathematics, and natural sciences than their Danish peers. Boys from immigrant families are particularly at risk of dropping out (Danmarks Statistik 2012).

Difficulties experienced by immigrant children are linked to other social problems. In larger Danish towns and cities, there is a trend toward segmentation, with different immigrant groups concentrated in certain areas for cultural and economic reasons. As a consequence, prosperous families are turning to private schools as a means of avoiding sending their children to “problem” schools or are moving to another district with a corresponding school. On the other hand, immigrant children and Danish pupils with social problems “gather” in certain areas. Such developments exacerbate the differences in school achievement and lower chances of finishing schools. Difficulties faced by immigrant children can be mainly attributed to cultural differences and limited resources. However, racist behavior may also be a reason for their difficulties. Among other things, it has been documented that career guidance counselors at vocational schools have been asked to supply Danish pupils when organizing work placements (Goul Andersen 2008).

13.5 New Developments

Currently, two lines of discussion can be identified. In the debate over school management and teachers’ work in schools, there is a strong opinion that teachers spend too little time teaching and too much time preparing or attending meetings. This has led to the government increasing the number of teaching hours for teachers. Furthermore, it has also intervened in the wage autonomy of teachers and decided that head teachers should carry out local negotiations on working times.

The second line of discussion concerns vocational education. The slump in demand and the high drop-out rates, which could not only lead to a shortage of qualified labor but also to the collapse of the vocational education system, are seen as a major challenge by the wider public. In a bid to counter this trend, proposals have been made to introduce access criteria to improve not only the level but also the prestige of vocational education. Discussions have also considered limiting access to the upper level of general secondary education to channel new pupils toward vocational education.

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14.1 History and Social Parameters of the Education System

14.1.1 Cornerstones of Historical Developments

The history of education as a formal institution can be traced back in Estonia to the thirteenth century – when Estonia was conquered by German and Danish knights in the wake of the crusades. For more information on education in Estonia, see: *Reforms and Innovations in Estonian Education* (eds Jaan Mikk, Marika Veisson,

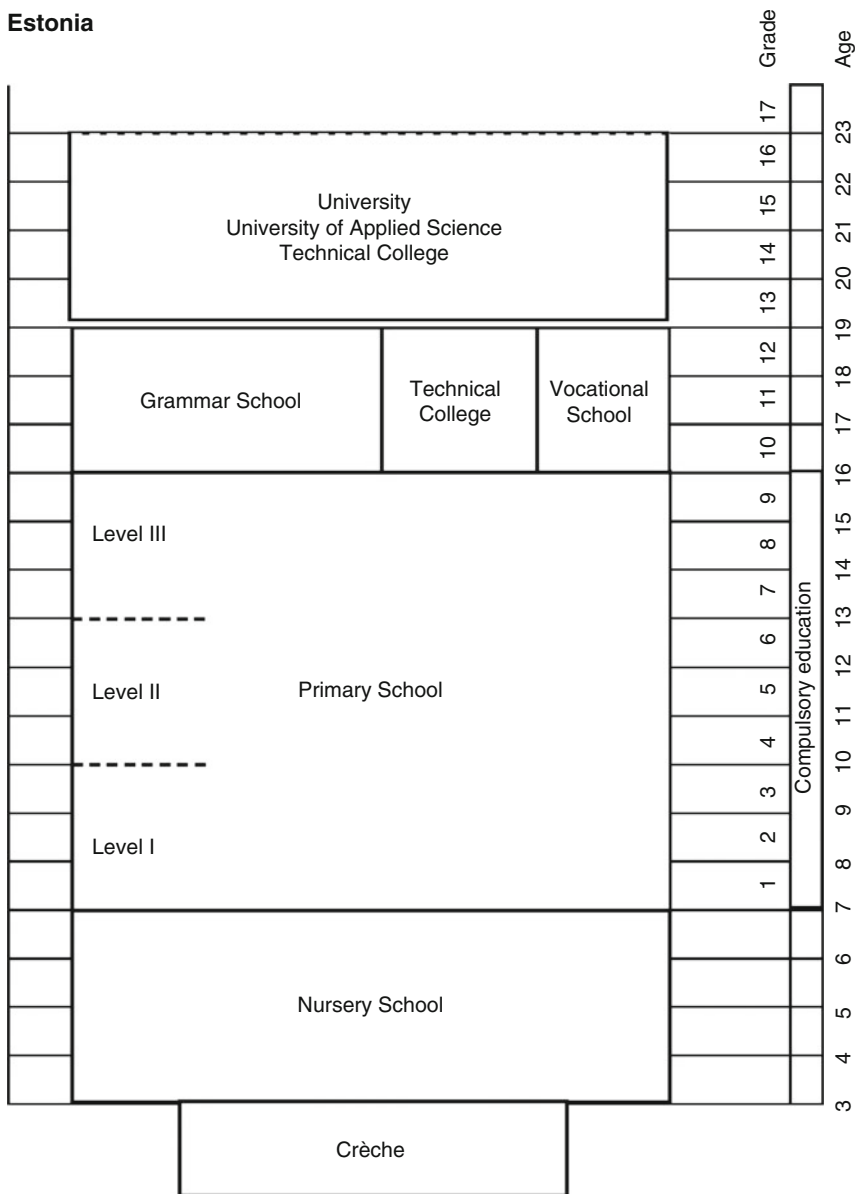
V.-R. Ruus (✉) • P. Reiska
Tallinn University, Tallinn, Estonia

Piret Luik (2008). *Baltic Studies on Education and Social Science*, Vol. 16) and a review by Ruus, V.-R., Henno, I., Eisenschmidt, E., Loogma, K., Noorväli, H., Reiska, P., and Rekkor, S. (Reforms, Developments and Trends in Estonian Education during Recent Decades, pp. 11–26). The first schools were part of cathedrals and monasteries and aimed to educate future priests. As elsewhere in Europe, lessons were made up of the seven liberal arts. The same schools also prepared pupils who wanted to study at one of the former European universities. These educated young people brought back the notion of humanism to Estonia. Toward the end of the same century came the call for priests to show that they could speak Estonian. Estonians who went to school at the end of the fifteenth century were no rarity (Andresen 1995, p. 14). The training to become a knight followed the same principles as in other European countries of the time; the appreciation of reading only came with the introduction of Protestantism. The aristocracy received their education at home, with tutors being engaged from the cities or from abroad. Apprentices learned the tools of their trade from the guild charter. In the sixteenth century, some guild journeymen were taught reading and writing.

The notion of the reformation arrived surprisingly quickly in Estonia. Lutheran preachings were held as early as 1517 in Estonian cities. The reformation characterized Estonian schooling as it did in other Lutheran countries for centuries. This was pioneered in the cities. However, there was also a counterreformation in Estonia, mainly restricted to the south of the country. This area fell to Poland following the Livonian War in the sixteenth century. The center of the counterreformation movement was Tartu, where a Jesuit grammar school was opened in 1583. At the same time, reformation ideas continued to spread in the north of Estonia, which had fallen to the Swedish crown. The education of the peasant majority however remained unchanged for the time being. Toward the first quarter of the seventeenth century, the whole area of present-day Estonia came under Swedish rule, which brought about a restructuring of the church and education system along Swedish lines. Academic grammar schools were established: in 1630 in Tartu and in 1631 in Tallinn. The first university was founded in Tartu in 1632. In the middle of the seventeenth century, the church began to foster the reading skills of peasants. Between 1684 and 1688 nearby Tartu was the Forselius Seminar to prepare schoolmasters. During the 4 years the seminar operated, the first generation of rural academics was trained (Andresen 1995, p. 49). Domestic lessons became widespread through the schools as a result of which literacy levels rose substantially.

The period of Russian rule in Estonia began at the beginning of the eighteenth century, following the Nordic War. The war and the plague that followed nearly brought the Estonian people to the brink of extinction. One of the very few developments in education at this time concerned the establishment of technical colleges, which were primarily set up to serve military and industrial purposes. In 1719, the czar ordered admiralty colleges taught in Russian to be established in Tallinn. These not only provided basic general education but also offered courses in shipbuilding and artillery. A navigation college was set up in Narva. However, Estonians were much more influenced by various religious movements in the

Estonia



eighteenth century than by the establishment of these colleges. Priests who had studied in Halle spread pietism in Estonia and, from the mid-eighteenth century, the Herrnhut movement. These stimulated the desire for learning among adults, who taught themselves to read, to write, and to play music which they then passed on to their children at home (Andresen 1995, p. 70). At the end of the eighteenth century,

home lessons were the main form of learning, supplemented by school and confirmation lessons.

In the period of enlightened absolutism that began with the accession to the throne of Katharina II in 1762 in which the concept of enlightenment played a key role, several Russian ordinances came into force in Estonia. The most significant consequence of this development was the growth in general schooling. By the end of the eighteenth century, girls were attending schools in many places and mothers were teaching their children to read. As a result literacy was relatively high and parish records from the eighteenth century show that half or more than half of the peasants could read. The situation in the towns was much better: 71 % of recruits in Tallinn could read and 42 % could write. The education system for the aristocracy also changed. Although the Tallinn cathedral school had become a strict, class-oriented educational facility toward the end of the eighteenth century, it was imbued by the spirit of enlightenment (Eesti kooli ajalugu 1989, p. 247). The concept of enlightenment was mainly promulgated by autocratic Russia. Multipliers of the notion were the domestic and church teachers who had been educated at German universities.

In the nineteenth century, life in Estonia changed in many respects. In 1802, the university in Tartu reopened, populated by teachers mainly from Europe who came with their enlightened ideas. From 1803, educational administrative districts were established in the Russian empire, and a commission was set up at the university in Tartu to manage the education system in Estonia and Livland. In the country, parochial schools emerged for children who could read. Children here were taught writing, arithmetic, and nature studies. The abolition of serfdom in Estonia and Livland (1816 and 1819) led to a deterioration of education: costs for maintaining schools became the responsibility of the peasants who were plunged into economic dependency following their release. As a result, parochial schools were only slow to develop. The situation was eased somewhat by traveling teachers who practiced reading with children and by Sunday schools in which enlightened and educated peasants taught children how to read. By and large, country children only completed the village school by the mid-nineteenth century; only 4 % attended the parochial school. Nonetheless, the latter played a key role in education if only because graduates often took up positions in the schools themselves or became domestic tutors (Eesti kooli ajalugu 1989, p. 370 et seq). In the first half of the nineteenth century, 3-year colleges were established dedicated to training village teachers.

In the mid-nineteenth century, there was a national awakening, occasioned by influential ideas primarily from Western Europe (J.B. Herder, J.J. Rousseau). Having zigzagged its course through German-Baltic and Russian influence and pressure, Estonia looked to Finland as a role model, a country that had gained greater autonomy in the Russian empire (Jansen 2001, p. 95). As a result, literacy improved. Toward the end of the nineteenth century, nearly all of Estonia's peasant population could read: according to a census from 1922, 90 % of the population could read and write and a further 5.3 % could only read. For the Estonian people, this was the fruit of centuries of dogged effort to acquire an education. The role of

village teachers in this process was essential: they ran clubs and societies and organized libraries and the distribution of newspapers, and they established choirs and orchestras which were a feature of virtually all country schools.

Until the Republic of Estonia was established, grammar school education in the country was in German or Russian, which offered minimal access to Estonians (Eesti kooli ajalugu 1989, p. 455). Nevertheless, this virtually unattainable multilingual grammar school and university education left its mark for Estonians: in many urban areas, three local languages were spoken – German, Russian, and Estonian. Teachers who had studied at Europe’s universities brought a humanistic, romantic, and enlightened body of thought to Estonia that influenced the national movement through a variety of channels. On 24 February 1918, Estonians’ efforts toward self-determination culminated in the proclamation of the Republic of Estonia.

Educational reform began immediately following the proclamation of independence and the country’s victory over hostile powers. Native-language single-type schools were introduced which provided primary school pupils with the opportunity to continue their education in further education or technical colleges. Textbooks were written in Estonian. As Estonia experienced a turn toward authoritarianism in the 1930s, the school system became more complex, the principle of single-type schools became weaker, and opportunities for primary school pupils to follow a grammar school track became tighter. Grammar schools were subject to fees. In 1936, the foreign-language policy at grammar schools was changed – the first foreign language was no longer to be German but English. The development of vocational education reached a high level toward the end of the first period of independence, with schools having different profiles, study times, and entrance requirements. In summary it can be said that in the 1920s, the school system had more of an integrating function, whereas in the 1930s, it had an increasingly selective effect, with secondary education being more influential.

The center of national higher education was the University of Tartu. The university housed the faculties of medicine, law, philosophy, mathematics and natural sciences, agriculture, and veterinary medicine; the faculties of sport, economics, and constitutional studies were added later. Most students took part in academic associations. Engineers were educated at the Tallinn Technikum (since 1938, the Technical University of Tallinn); artists could study at the private “Pallas” school of art and, since 1938, at the State University of the Arts; and for musicians, there was the Tallinn University of Music (since 1923, the Conservatory). Pupils could also choose a military profile. Grammar school teachers were trained at the University of Tartu, and primary school teachers at various seminars. An academic elite emerged comprising researchers and teachers. Thus, during the brief existence of the Republic of Estonia, a European, but national-thinking, Estonian-speaking *intelligencia* was formed.

Estonia’s national independence practically ended with the signing of the Molotov-Ribbentrop Pact in 1939, and from 1941 to 1944, Nazi Germany dominated Estonia. In autumn 1944, the “Russian era” reemerged with the Czarist power replaced by Stalinist totalitarianism. Arrests and deportations followed. It is

assumed that Estonia lost one-fifth of its population through war, flight, and repression (Tarand 2001, p. 139). The educated elite were hard hit and the new power introduced major changes in education. The curricula of the Soviet era were characterized by the following:

1. All subjects carried an ideological stamp; history and social studies suffered mostly from falsifications.
2. Contemporary studies of economics were nonexistent.
3. The country was isolated from the social developments taking place in the rest of the world. Western philosophy, art, and (social) science were only taught in conjunction with criticism which resulted in “ideologically proper” viewpoints for the “civil” way of thinking and for social order.
4. Heightened social isolation due to the lack of foreign-language skills within the population, with fewer western languages being included in the curricula of general education schools.
5. An increasing proportion of Russian language, literature, and history in the curricula of Estonian-language schools. At Russian-speaking schools, time allocated to Estonian language and culture was very low and it was often not taught to the extent envisaged. Estonian- and Russian-language education were kept separate.
6. A strong preference for encyclopedic factual knowledge – particularly in natural sciences – in contrast to knowledge based on problem-solving, decision-making, and dealing with situations.
7. Ever-recurring efforts, mostly unsuccessful, to bring together academic education in line with the needs of industrial production and everyday life.

Education was made more accessible in the Soviet era, mainly to feed the needs of industry, especially the war industry. All postwar generations acquired a general education, raised during the Soviet era from 7 to 9 years. The numbers going on to general education grammar schools or technical colleges continued to grow. At the beginning of the 1980s, 99 % of 18 year olds were following an education that could qualify them for university (in general education grammar schools or in technical colleges) (Helemäe and Voorman 2000, p. 20). Native-language higher education was retained in Estonia and in other Baltic states, but with a growing Russian population, there were a growing number of Russian-speaking study groups. The number of university graduates grew strongly in the Soviet era. Although Soviet educational policy was very egalitarian, if not uniforming, selective processes were also at work. During the Stalinist terror, children and grandchildren of the former elite had little chance of attending university if “their papers were not in order.” In contrast, working-class children were given special favors. At the end of the 1950s and beginning of the 1960s, during *Khrushchev's* period of political thaw, direct political pressure eased somewhat, paving the way for even greater internal selection powers in education. While a grammar school certificate might have permitted entry to an elite in the 1960s, by the 1980s, there was a much stronger stratification of young people based on the grammar school they attended. Being able to study at

university hinged much more on whether students went to school in an urban or rural area and on the teaching methods taught in the school. Children were often selected to follow a more advanced track before they even started school. Because technical colleges only enable students to take up a university place at a later age, they were often seen as a dead end for pupils (Helemäe and Voorman 2000).

14.1.2 Key Phases of Reform and Innovation

Estonian education experienced a turning point in spring 1987 when 1,000 teachers took part in a teachers' congress. The uniform Soviet education system was strongly criticized by teachers at general education schools, who demanded sovereignty for the Estonian education system. At the heart of their campaign was the call for their own curriculum for Estonian general education. Following the congress, discussions took place across the country with various public representatives taking part. Commissions were set up to compile new curricula. Consequently, in autumn 1989, 3 years before the collapse of the Soviet Union and the return of independence, Estonian-language schools were planning lessons in line with the new curricula in which Communist ideology was virtually completely eradicated, the special status of the Russian language was abolished, and the list of subjects taught and the proportions of time allocated to them were changed. Higher education supported the reforms taking place in general education schools, and many teachers were involved in formulating new curricula, but not much thought was given to reforming higher education. Representatives of the technical colleges were generally against reform: their activities were strongly controlled by Moscow.

The next focal point of educational reform concerned the renewal of the curricula. Thanks to the developments of the 1980s and the work achieved at that time, curricula were renewed quickest of all in the area of general education. The starting position for the new curricula was Estonia's vision of establishing a market economy and a democratic, dynamic information society that would be part of European/western culture. This notion called for the acceptance of constructivist concepts of knowledge and learning. Aims emphasized the identification and resolving of problems, decision-making based on democratic means, skills of forecasting, and an awareness of responsibility. A key factor was the ability to motivate, reflect on, and manage one's own learning. The design of content was based on the classification of learning areas after specific skills were identified in the curriculum. In particular, skills were highlighted that would be required in all subjects and all aspects of learning, such as the ability to make decisions, learning and self-management skills, etc. The new curriculum came into force in 1996. Parallel to revising curricula, the Law on Nine-Year Primary Schools and Upper Secondary Schools was compiled which obliged schools to compile their own curricula. The 1996 curriculum was criticized for failing to harmonize the individual elements of school-based education. While the main part was seen in a positive light, individual syllabi were said to be filled with trivial information that proved to be an extra burden for children. The revised version of the curriculum came into

force in 2002. This specified the skills required for the curriculum to be fulfilled in a much more coherent manner. Up until the beginning of the twenty-first century, the curriculum was seen positively by the majority of teachers and head teachers (Ruus 2005). But this did not mean that the curriculum was implemented in full in daily practice.

Reforms relating to specialist education began later and proved to be slower and much more difficult (Rekkor 2002). In the Soviet era, vocational education was strongly controlled by Moscow and weighted toward heavy industry. Vocational education guaranteed the perpetuation of the working class and divided the society into social classes (Helemäe and Voorman 2000, p. 266). Following economic restructuring in the free Republic of Estonia, shortfalls in technical education became prominent. Overcoming the problems was not easy, and despite the contact established with Sweden and Finland, Soviet principles dominated this sector up to the mid-1990s. This was largely due to the lack of skills and inadequate state control. The opening up of new disciplines and the merging of curricula were left largely to the schools without the state intervening to provide coordination and control. Reforms in vocational education were triggered by Estonian-Danish development programs and international further educational projects in 1993. The Phare program was launched in 1995. The turn of the new century marked the start of reforming state curricula, and technical colleges initiated model curricula that would correspond to vocational standards. However, the weakness lay in state control. Curricula reform gathered new wind in 2005 with the birth of the European Social Fund. As a result, conceptual foundations for merging curricula have been laid. National curricula have been drawn up for many subjects and have involved external social partners. Today, training is based on module curricula in all technical colleges.

14.1.3 Social Context

In 1991, Estonia regained state independence. In many respects, this plunged society into upheaval: privatization, liberalization of prices, and economic restructuring. Unemployment was a new experience for many. New laws had to be created to cover all aspects of life.

14.2 Fundamentals, Organization, and Governance of the Education System

14.2.1 Educational Policy and Basic Legal Principles

The Education Act adopted in March 1992 was one of the first laws ever to be passed. The “spirit” of the law lies in supporting the development and lifelong learning of all people living in Estonia. The central structural elements of the law were the curriculum and the levels of education (based on the ISCED

classification); another key aspect was informal education. The most radical laws were those preparing the foundation of private nonuniversity types of higher education. Following the Education Act were the Law on Nine-Year Primary Schools and Upper Secondary Schools and the Adult Education Act (both 1993); the Higher Education Act of 1995; the Vocational School Act, the Law on Vocational Colleges, and the Private School Act (all three 1998); and the Pre-school Childcare Institutions Act 1999. Unfortunately the conceptual cross-purposes contained in the Education Act still remain today. The laws subordinated below this framework statute are based on institutions not on the curricula or educational levels. The Estonian parliament has even drawn attention to this conflict. To date, statutes have been adopted on the basis of the premises contained in the framework law, and amendments have been solely restricted to introducing numerous supplements to the law. The chronology of the statutes reflects the speed at which the respective education fields were rethought. The delay in adopting the Pre-school Childcare Institutions Act was based on the principle adopted by the infant republic that parents should be responsible for bringing up their children. The widespread practice in the Soviet era of entrusting preschool education to nondomestic facilities was viewed as a socialist relic. The well-trained network of nursery school setup under the Soviet regime suffered as a result. However, experience showed that mothers could not stay at home for financial reasons and they did not want to give up their jobs. For years now, there has been a shortage of nursery school places. It is still remarkable that there is still a division between schools based on the language of instruction – Estonian and Russian. The first amendments were introduced in 1997 stipulating guidelines for the transfer from Russian to Estonian as the language of instruction in schools from 2007. By then 60 % of the total curriculum at Russian-language grammar schools should be in Estonian.

Following the adoption of the Higher Education Framework Act (1996) and the accreditation of the curricula together with external experts (2003), development began on reformulating higher education curricula. This moved universities to take the development of their curricula seriously and the focus on self-evaluation. Estonia had joined the Bologna Declaration as early as 1999 – 5 years before the country joined the EU. Since 2002/2003, all universities accepted students on the basis of the 3(-year bachelor) plus 2(-year master) system. Exceptions are provided for in some disciplines such as medicine, veterinary medicine, pharmacy, architecture, and primary school education where programs normally run for 5 or 6 years.

14.2.2 Governance

A dominating trend is the increasing direct responsibility of schools. From 2006, for example, general and vocational education has no longer been monitored by inspectors but by the facilities themselves. They are obliged to carry out internal audits of management, leadership, collaboration with stakeholders, resource management, learning processes, and the pupil's achievement. The state provides consulting services in this respect. One of the duties of the consultant is to compile

a report on the results of the internal audit. In this sense, the state exercises a certain degree of control over school life. As is standard in performance-oriented leadership systems, this scheme works in conjunction with other quality indicators – the results of entry tests, final examinations, and state examinations. When it comes to higher education, the role of the state is much greater. At the behest of the minister in 2003, for example, precise accreditation regulations were defined listing exactly the institutional audit and the audit of the curricula. Such a system increases the facility's reporting duties and its responsibility for the results. Thus, Estonia is following the trends characteristic of most developed countries over the last 25 years.

Education is managed via curricula. Curriculum development acquired a more systematic character in 2004 and 2005 through the start of two projects – the first was the project initiated by the Ministry of Education on scientific-based curriculum development, and the second was the project sponsored by the European Structural Fund on the increasing relevance of Estonian higher education in respect of developments on the labor market. The situation today is that institutions of higher education have developed results-based curricula in harmony with the Bologna Process and the European Tuning Project (Gonzales and Wagenaar 2005), in which developments look at graduate skills adopted to meet the needs of the labor market (Rutiku and Lehtsaar 2006).

14.2.3 Funding

A key instrument of management is of course the funding of educational institutions. The state budget funds teacher salaries and in-service training in community and private schools. The state participates in the management structures of educational institutions through adopting statutory regulations in which funds are provided to enable the selection of head teachers and teachers and the inclusion of parents and pupils (in boards of trustees, committees, and supervisory bodies). This “customer” focus is on the increase. In 2000, for example, regulations were passed governing the boards of trustees at general education schools in which there was only a teachers' representative; the largest decision-making power and strongest representation was borne by parents and school sponsors.

14.3 Overview of the Structure of the Education System

The Estonian education system is divided into the following levels: primary education, basic education (Level I), secondary education (Level II), and higher education (Level III). A distinction is also made between general, vocational, and extracurricular education. Primary education ends after Year 6. Teachers teach all subjects. After completing their basic education, pupils can continue their education at a grammar school or a technical college. Completing these schools entitles pupils to study at university. The organizational principle behind the system ensures that

pupils will not experience difficulty due to underlying shortcomings in the system when they move from one level to the next. Since 2006/2007, pupils who for whatever reason have not completed their basic education can also continue their education at technical colleges by following special programs. Compulsory schooling applies to children from the age of 7 through to the end of Year 9 or until they turn 17.

The level of education among Estonians is relatively good. In 2004, 31 % of 25–64 year olds held a higher education qualification. This was higher than the OECD average of 25 %, but lower than that of Finland (34 %), Sweden (35 %), Japan (37 %), and the USA (39 %) (Eesti kõrgharidusstrateegia 2008). Among the 20–24 year olds, 80.9 % had completed upper secondary school. This was higher than the EU average covering 25 countries, but below that of the Czech Republic, Poland, Slovakia, Lithuania, Greece, and others (Europe in Figures 2007, p. 87). Without doubt, a remarkable achievement in Estonian education has been e-education, which started with the introduction of the Tiger Leap program in general education schools in 2001. Today, 99 % of Estonian children have access to the web, 90 % have the necessary skills to handle information and computer technology, and three-quarters use the internet for school work. The development plan for e-education for 2006–2009 envisages generating the conditions necessary for a learning society (Õppiv tiiger 2006).

In the last 10 years, 70 % of pupils continued their education in the grammar school, while 30 % went to technical colleges. In the same period, 60 % of grammar school pupils and 10 % of technical college graduates went on to study at university. Over 10 % of pupils leaving grammar school went on to study at universities of applied science (Vocational education 2007). One of the problems is that of truancy and the level of dropouts from basic education (in 2006, this concerned 1.5 % of pupils). One-fifth of schools felt that this was a serious problem. On the other hand, the proportion of under 18's that have not completed basic education and do not study is lower than that of the EU average (Koolikohustuse täitmine 2007).

14.3.1 Preschool Sector

Great value is placed on the role of preschool educational facilities in the development of children. In recent years, between 83 % and 86 % of 3–6 year olds attend nursery school. The proportion of 1 year olds (19 %) and 2 year olds (57 %) attending *crèches* is relatively high (Eesti statistika 2008, p. 70). However, this is not enough to cover demand, and waiting lists at nursery schools are long. Plans have therefore been drawn up to expand the number of places in nursery schools in 2008–2011. Systematic preschool education in nursery schools or in schools themselves is seen as a necessity. Research has shown that roughly 10 % of children do not make use of the system (Üldharidussüsteemi arengukava 2007–2013, 2007). Generally, Estonian preschool facilities are very much child centered. All nursery schools have their own curricula which are often based on a state framework curriculum. Thanks to the Soros Fund, the “step-by-step” methodology has gained

importance in Estonia. However, it must be said that given the prevailing “competition” mentality among teachers and carers, school knowledge is often pushed to the foreground at the expense of activities intended to develop personality. Widespread competition for places in elite schools means that preschool children have to go through unreasonably intense preparation, by panicky parents, often to the detriment of the children themselves. Official educational policy recognizes the fundamentals of integrated education, and efforts are made to teach special-needs children together with other children; if necessary children are separated in nursery school. One of the problems is the availability of special educationalists, especially speech therapists and psychological advisers.

14.3.2 Primary and Lower Secondary Education

Primary and basic education is divided into three 3-year levels. The language of instruction is mainly Estonian and Russian. According to the national curriculum which came into force in 2002, the proportion of the timetable allocated to the different subjects is as follows: Estonian 19 %, foreign languages 13 %, mathematics 15 %, natural sciences 10 %, social studies 4 %, history 4 %, sport 9 %, handicrafts and performing arts 10 %, music 5 %, and integrated physical, cultural, and human education 2 %. Roughly 10 % of the timetable is open to schools to decide. Schools that have a different language of instruction basically follow the national curriculum with the exception of the number of hours devoted to Estonian as the official language of state. A considerable number of pupils whose first language is not Estonian learn in Estonian schools or in language integration classes: in 2007, this concerned more than 20 % of pupils (Haridus- ja Teadusministeeriumi 2008). Pupils in Year 1 have 20 lessons, in Year 2 23 lessons, in Years 3 and 4 25 lessons, in Year 5 28, in Years 6 and 7 30, in Year 8 32, and in Year 9 34. Truancy and drop-out rates are a problem mainly in Years 7–9 (Koolikohustuse 2007). A number of measures have been taken to counter this such as learning support, boarding schools for children with unfavorable family backgrounds, classes for pupils with behavioral and learning difficulties, guidance, etc. However, this has still not led to a significant improvement of the situation. This may be due to the fact that a large proportion of poor performance in school is due to what goes on out of school.

Even more teachers are of the opinion that they are not wholly responsible for the learning success of children under their care and that the main responsibility has to be borne by the child and his/her parents. As mentioned above, Estonia has officially accepted the principles of integrated education, but as children are taught in special classes and groups, actual compliance with this principle is somewhat questionable. Of course, there are also schools for children whose special needs do not allow for them to learn together with other children. However, the availability of special education assistance and support remains a problem still today.

According to international comparative studies, the learning achievements of Estonian pupils far exceed both OECD and EU averages. In the TIMSS study from

2003, Estonia came fifth in natural sciences, first in geography, fifth in chemistry, sixth in biology, seventh in physics, and eighth in mathematics. In the PISA study from 2006, Estonia came fifth in natural sciences, fourteenth in mathematics, and thirteenth in functional reading.

14.3.3 Upper Secondary Education

Between the mid-1990s and 2006, nearly all pupils who had completed basic education continued schooling either at a grammar school or at a technical college. About two-thirds of pupils attend a grammar school and one-third technical college. However, in 2007 for some unknown reason, the situation changed with less than 90 % of pupils now continuing their education (Eesti statistika 2008, p. 75). The grammar school is based on 35-h programs that provide for the merger of individual programs and learning groups from different ages. Overall there are 72 obligatory courses at grammar school. There is no fixed number of hours per week; pupils can make up their own program for one-third of the time and compile their own profile. There are language, business, technical, and sports grammar schools. In addition, there are some differences between Estonian-language and Russian-language grammar schools, albeit these will probably become less over time, not least because Russian-language grammar schools started to teach some subjects in Estonian from 2007 to 2008. The most difficult problem in Estonian grammar school education at present is an inexpedient school network. Given the low birth rate, many grammar schools have low pupil populations. Consequently, teachers cannot be offered a full position for their subject, and pupils have less choice in the number of options.

The structure of vocational education at the upper level of secondary education has changed considerably since the country regained independence. Colleges are no longer dominated by heavy industry and agriculture, and many new subjects have emerged, most of which are related to the tertiary sector. Vocational education inherited an extremely futile school network from the Soviet era that had to be regulated more effectively. Today, a large proportion of vocational education takes place in facilities populated by learners from a wide variety of backgrounds, from dropout from basic education through to adults taking part in development and training courses. Between these two extremes, the same facility will house students who have completed basic education and grammar school and who are now attending professional training as well as tertiary level students studying applied sciences.

The secondary level of vocational education suffered from its poor image for a long time. There were many reasons for the poor image, such of which were due to problems inherent in the system. In technical colleges, the proportion of general education subjects is less than in grammar schools. This puts graduates in a much worse position when they start university. Although the establishment of universities of applied sciences eased the situation somewhat, pupils coming through the technical college system have a poorer chance to continue their education than pupils completing grammar school. Today, technical college graduates who want to

study at university have the chance to attend concentrated general education subjects during college time. Thanks to a variety of EU projects, the technical equipment and economic situation of technical colleges have improved enormously. One problem technical colleges have to face is the high drop-out rate. In 2006/2007, this accounted for 14.7 % of the total number of pupils (Haridus- ja Teadusministeeriumi valitsemisala arengukava “Tark ja tegus rahvas” 2009–2012, 2008, p. 9). One factor that is hindering the development of the upper level of secondary education, including grammar schools, concerns the lack of a uniform system of administration: as a rule, grammar schools are administered locally, but 70 % of technical colleges are run by the state – a source of a conflict of interest.

14.3.4 Higher Education

The student population in Estonia is relatively high. In 2005, 65.5 % of the 20–24-year-old age cohort was studying at university – above the EU average for 2004, but below the averages for Scandinavian countries and the other Baltic states. Given the size of Estonia, there are many universities: in 2007, there were 35 institutes of higher education, including 11 universities, 21 universities of applied science, and three technical colleges that also offered higher education programs. There were also 16 private institutes of higher education. The majority of students study at the six public universities. The University of Tartu is the biggest followed by the Tallinn Technical University, the University of Tallinn, and the Estonian State University. Compared to OECD averages, more Estonians study social sciences, economics, law, humanities, arts, and agriculture, whereas fewer study natural sciences, engineering, and exact sciences. In recent years, figures for the latter-mentioned disciplines have grown thanks to state-managed educational projects and are now approaching OECD levels (Seletuskiri 2006, p. 29).

The economic situation of Estonian students is often complicated, and for years, now more than half of students are forced to work on the side (OECD 2007, p. 35), which gives rise to the question of whether we can actually speak of fair access to university education in Estonia. In 2007, only 38 % of students were male. This uneven distribution of the student population was also reflected in masters’ programs (66.5 % female) and doctoral programs (55.6 % female). The continuity of higher education is being strongly impacted by the low numbers of PhD students. To meet the needs for university researchers and the knowledge-based economy, there would need to be twice as many PhD students (Haridus- ja Teadusministeeriumi valitsemisala arengukava ‘Tark ja tegus rahvas’ 2009–2012, 2008, p. 11).

14.3.5 Adult Education

The educational opportunities for adults are wide and varied. Under certain circumstances, it is possible for adults to take up part-time study at university free of charge, to continue a course of study that was previously interrupted or to start a

new course of study in subjects prioritized by the state. Furthermore it is possible to acquire a general education free of charge, to prepare for state exams at adult grammar schools, and to receive vocational training while at work. There is also a special vocational education program for those who have not completed basic education and are older than 17 years. In 2005, a consortium of e-technical colleges was founded, aimed at developing collaboration in e-education between universities of applied science and technical colleges and at fostering lifelong learning. Professional development and labor market training are provided by both technical colleges and job centers. There are also comprehensive computer literacy programs for people with a low level of education. People who do not or who barely speak Estonian can receive institutional and financial assistance to support the learning of the language. Since the latter half of the 1990s, there has been an annual forum to foster lifelong learning and adult education. A system of professional qualifications is being compiled to ensure the mobility of labor (Elukestva õppe strateegia aastateks 2005–2008 vahearuanne 2007). Unfortunately, current research does not give room for complacency. A study conducted by Eurostat showed that only 6.4 % of 25–64 year olds had attended development and training programs in the 4 weeks leading up to the study. The EU average was 10.1 %. In many countries, including Sweden, Denmark, and Finland – countries that are often role models for Estonians – figures even reached 20–30 %. Concern is raised by the fact that only 10.1 % of people with a lower level of education (basic secondary education or less) took part in these programs (EU average 23.1 %) (Eesti inimarengu aruanne 2008). Fortunately, the trend is set to rise – adult education is to receive state funding and facilities are recording higher interest in their courses.

14.4 Developments in the Current School System

The starting point for the more recent era of educational development can be said to begin with the year 1999, when Estonia joined the Bologna Declaration. The peak moments of this era were the years of 2004, when Estonia became a full member of the EU, and 2010, when it received an invitation to join the OECD. This can be named the era of Europeanization and globalization of Estonian education. This long-term process is ongoing.

Typically for this era, a number of strategies and development plans have been launched. The most significant of the above is the complete development plan “Clever and active nation” (2009–2012, effective with amendments also for 2013–2016). This document is an organization-based development plan for all areas in the jurisdiction of the Ministry of Education and Science – education, youth work (including out-of-school or hobby education), research and development, language and archives, and the ministry as an organization. It is updated annually with new data and other necessary inserts. The completion of this development plan was a feat of its own: for the first time since Estonia regained independence, we have a publicly accessible, compact overview of the current situation and future prospects that includes all the subsystems and subfields of the

jurisdiction. The document also provides the administrators of the Ministry of Education and Science a common ground in their daily work as public servants.

The development plan gives an outline of the EU and global (OECD) targets, rules, and standards that have served as the basis of evaluating the current situation and setting future directions for Estonia and compares the current situation of the Estonian education (2010) with the targets set by the EU Lisbon Strategy and EU averages. The conclusion of the comparison is that by several indicators (preschool education, literacy levels of 15 year olds, further studies of basic school graduates, young people's participation in tertiary education), Estonia has already fulfilled the EU targets set for 2020 or is at least very close to achieving them.

At the same time, the percentage of non-studying young people (18–24 year olds) with low educational level (basic school and less) was larger than what the EU 2020 framework allows; neither did the participation rates of adults (25–64 year olds) in lifelong learning meet the EU 2020 targets in 2010. Moreover, Estonia falls short of low student mobility and has limited numbers of foreign faculty professors and doctoral students, poor financial support to doctoral students who take their doctorates abroad, etc. For the country to attract more highly qualified workforce, including people who hold scientific degrees, the development plan emphasizes the need to sustain Estonia's positive reputation and to establish exemplary learning conditions for children of highly qualified foreigners who have moved to Estonia.

The guiding principle of the entire development plan is internationalization, predominantly integration with EU educational policy and educational developments in Europe. In general education, internationalization is supported by opening the Tallinn European School and international study programs that support the qualified employees of EU and international organizations and foreign companies in moving their career to Estonia. In vocational training, internationalization is implemented through the 8-level occupational qualifications system, establishing occupational qualification standards and issuing occupational qualification certificates. Internationalization is most dominant and extensive in higher education; a relevant strategic document was approved as early as 2007.

The following views and principles served as the starting point for this strategy: science and higher education are international by default, a knowledge-based society needs highly qualified labor, research and development have to be assembled in large centers to improve Europe's economic competitiveness, a global labor market has emerged, and higher education has become a cross-border commercial activity. The strategy determined the need to create a legal environment that would support internationalization and incorporate the following: quality insurance of higher education (including accreditation), facilitating academic mobility, recognition of higher education diplomas issued abroad, providing and recognizing international joint curricula and degrees, right of Estonian students to apply for study grants and study loans for studies abroad, and cross-border provision of higher education (opening branch offices of Estonian universities abroad and vice versa). The document also suggested revisiting the immigration policy in order to enable talented foreigners to study in Estonia and also launch their working career in the country after completing their studies.

In the internationalization framework, a special emphasis was put on increased mobility of both students and university teachers, developing postdoctoral studies, repatriating young scientists who have completed doctoral or postdoctoral studies abroad and utilizing their skills at home. Another important measure is the internationalization of curricula: introducing foreign-language curricula in Estonia's higher education, opening regional (i.e., pan-Baltic) foreign-language curricula, developing international joint curricula, and incorporating international and interdisciplinary aspects in Estonian-language curricula.

In order to promote internationalization, it was considered important to have an atmosphere that is open and tolerant, embracing cultural differences, where all students and employees are treated as equally independent of their racial, cultural, ethnic, etc., background. It was pointed out that Estonia should improve conditions that would allow foreign students and professors to integrate Estonian social and cultural life also outside the school. Among other vital factors, the reputation of Estonia's higher education and sufficient information about study possibilities in Estonia and abroad were mentioned. Internationalization is further supported by the volume and level of foreign-language studies: the Estonian education system is among the top performers in the EU by the number of foreign languages taught. The number of people who speak just one language has continuously decreased (from 21.8 % in 1998 to 12 % in 2010), while the percentage of those who speak two and more foreign languages has steadily increased. The problem is that English-language studies are overrated while other languages receive far less attention. In 2011/2012, 60.2 % of pupils in Estonian schools providing general education studied English, 28.1 % studied Russian, 9.7 % studied German, and 2 % studied French. The strategic targets include having the majority of the population speak at least two foreign languages besides their native tongue, increasing the number of languages studied, and having the nation's foreign-language skills meet the needs of the country.

Moving closer to domestic problems of the Estonian education, the development plan rightfully cites as a positive development the fact that dropping out of basic school and the first year of grammar school has been cut down to minimum as a result of the implementation of a number of measures (study counseling, established support structures). Only 0.5 % of basic school and 1 % of first-year grammar school pupils dropped out of school while only 1 % repeated a class in 2010. As we recall, dropping out of basic school was a serious concern in the 1990s. Regrettably, drop-out rates remain high in vocational training and higher education. To fight this, the following measures will be implemented: increasingly efficient career and study counseling, a special program to return the dropouts to the education system, recognizing studies completed outside the formal education by institutions of higher education, etc.

Positive developments include the trend of the Estonian language improving its status as the second language among people living in Estonia. While in 1997, 44 % of non-Estonians living in the country spoke Estonian on a certain level, this rate had gone up to 64.1 % by 2010. In addition, the level of Estonian skills had also improved. Moreover, the number of school pupils participating in

Estonian-language studies, including language immersion, has increased, reaching one-fifth of the basic school children whose study language is not Estonian.

Internationalization has its dark side too. Mother tongue Estonian-language skills have been fluctuating if one looks at the graduation exam results of basic school and grammar school in 2010/2011. The native-language skills of first-year university students were found to be unsatisfactory by a 2010 study. The onslaught of the English language, a side effect of globalization, is a danger factor since it narrows the fields of use of the Estonian language.

Introducing the development plan's principles into legal acts has been especially intense in the past few years. This has given reason to speak about a new wave of educational reforms. If we look at the strategic mind-set of the development plan, we could emphasize its technocratic character (numeric indicators instead of general aims; the mechanisms of involving social partners and holding public dialogues in policy making are barely touched upon), economism (education is viewed primarily from the standpoint of economic development, lowering the connection to culture or social development with the exception of language policy), and mechanical assumption of EU norms and indicators without any interpretation or rationalization or attempts to adapt them to the local situation.

More or less in parallel with the development plan of 2012 was the completion of another strategic document, "The five challenges of Estonian education" with the time target set of 2020 (to be referred as ES 2020). The expert panel of authors included representatives of the Foundation Estonian Cooperation Assembly, the Estonian Education Forum and the Ministry of Education and Science, schools, and universities; the general public was also consulted on numerous occasions.

The ministry's development plan and ES 2020 have profound differences. The development plan did not seek to provide a general vision of the kind of education or society that Estonia should hold as a target. The focus was on results, mostly measurable results in the ministry's jurisdiction. The data presented are vast and reliable which make the offered solutions and expected results specific and convincing. Overall, however, the ministry's development plan concentrates on solving the urgent issues or fulfilling EU norms and does not present a future image of the Estonian education that would be inspiring or mobilizing for the general public.

ES 2020, on the other hand, has attempted to create a vision regarding the direction in which the Estonian education should take in the coming two decades, to use this as a groundwork of presenting the key strategic concerns and the most pressing challenges in the field of education that likely will have a direct impact on the well-being of the Estonian nation and education and the country as a whole. ES 2020 views education in connection with human personality, the society, and cultural developments. True, both documents share some common ground, especially with regard to the views on labor market and educational participation.

The highest value that the educational policy must serve according to ES 2020 is a person as a unique individual and his well-being and development. Of personal qualities, the willingness and ability to study, ability to think creatively and critically, ability to cope with the unknown and failure, ability to be a leader and

take risks, ability to value diversity and cooperation, self-regulation, and stress tolerance were highlighted.

The guiding principle of ES 2010 is the belief that the development of an individual and his environment in the education system depends on both internal and external factors of the education system. Education itself is presented in the strategy as a complex, multilevel, and multidimensional system that is mutually influenced by other spheres of society, such as economics, politics, and culture. Among the factors listed as the most consequential for the Estonian education in the current historic phase, the document cites the small population, the relative poverty of the people (compared to the EU), globalization, changes in family structure, stratification (regional, gender based, income based), and the people's, especially children's and young people's, active involvement in global networks, as well as the education system's relative passivity to outside influences combined with low resistance to the negative impacts of the society. In the ES 2020 strategy, a central place is reserved for studying (in the modern sense of the word) as a person's most vital adaptation mechanism.

The ES 2020 mentality is ecological by nature. In its view, the most important feature of any modern environment – no matter from which individual or collective subject's standpoint we look – is their extreme mutability, including the speed, interconnectivity, and interdependence of changes, and the fact that changes are difficult if not impossible to forecast. An environment with such a high degree of dynamism provokes adaptation difficulties in every being who lives and acts in this environment. Those who survive are the ones who have found their answer to adapting to the changes – whether it means changing oneself or change of the environment in the desired direction.

From this standpoint, ES 2020 highlighted five strategic points or so-called challenges of the Estonian education:

- Moving toward a study approach that focuses on development and cooperation
- Improved position and reputation of the teacher
- Increased participation in the studies
- Creating a stronger connection between education, the knowledge-based society, and innovative economy
- Making digital culture a part of the Estonian cultural sphere

In addition, the document includes a subdivision “Educational Administration” in support of development, the objective of which is to present organizational solutions for implementing the strategy. The following solutions are considered of importance in administering education:

- Taking the educational laws to a common ground, based not on institutions but level of education (basic, secondary education, etc.) and the functional types of study (general education, vocational training, etc.)
- Creating opportunities guaranteed to all children to receive basic education

- Structuring the school network, including separating basic school and grammar school
- Reviewing the system of outside evaluation of state exams and schools
- Developing the network of pilot schools
- Developing a commission-based system in educational research
- Reviewing the existing education funding models to make them compatible with the principles of equal treatment and results oriented
- Implementing legal and social measures as well as financial means to guarantee meeting the laws and requirements that deserve to be respected

The government of Estonia has established ES 2020 as the basis for further development of the nation's education. Currently, work is being done to make the strategy practically usable.

14.5 New Developments

Some tangible changes in the educational policy in the recent years manifest themselves at all levels of the education system, although in various degrees. The effects of the qualification framework have been the weakest in general education, but this can be expected to increase in the near future.

With the introduction of the new national curriculum, basic school and grammar school were separated. In basic education, a stronger emphasis was put on upbringing and pupils' ability to shape their later educational path either in technical college or grammar school providing general secondary education. In the grammar school, choices available for schools and pupils were expanded by introducing study profiles and optional courses. The focus has been on the integration of curriculum, implemented through overarching subjects that pervade all subjects. In performance evaluation, a formative evaluation of pupils was brought to the fore. Emphasis on school children's creativity, initiative, and analytical skills has grown. To this end, creative tasks, either individual or group based, were included in the curriculum, as well as pupil research and practical work. The school program cannot be completed without passing the latter, although the choice of subjects and organizational details remain for the schools to decide. These changes place increasing demands on school curricula, on the cooperation between teachers, on schools' strategic leadership, and on the cooperation with pupils' organizations and parents.

In June 2013, the president promulgated the Law on Nine-Year Primary Schools and Upper Secondary Schools Act which had created extensive controversy after having been passed by parliament. The law was adopted in an incomplete form, since parliament could not reach a consensus on the issue of school funding. The most important amendments focus on the requirement, also stipulated in the curriculum, that a grammar school have several study profiles. This requirement calls into question the existence of small rural grammar schools. To solve this issue, a new status of grammar school – the state grammar school – was introduced

alongside the municipal grammar school which had hitherto been the only official form. In doing so, the state has taken on the responsibility of guaranteeing that there is at least one strong grammar school with a variety of study profiles in each of the 15 counties. Behind this amendment was the need to free sparsely populated rural areas from their obligation to maintain grammar schools that had only a handful of pupils. Instead they can now use the freed up resources to strengthen local basic schools.

In 2012, parliament passed a law amending the Universities Act and the Institutions of Professional Higher Education Act. The motivation behind the amendments was the need to reshape the higher education funding system. This need was formulated by the OECD in a 2007 analysis of Estonia's higher education. One problem in higher education concerns the huge number of working students during their studies (in 2010, 56 % of students worked). Institutions of higher education fear that this might deteriorate the quality of the studies. Another reason for the amendments was the fact that the state-commissioned education has not succeeded in functioning sufficiently well in the national interests. For example, via the system, 40 % of funding went to priority specialities such as science and mathematics, technology, and engineering. Despite this, only 25 % of students were studying in the fields. The new law abandons the state-commissioned education and replaces it with operating support based on performance indicators. The funding does not dictate how many places must be available in a certain field of study for the institutions of higher education. This decision is for the school to make, based on its profile and possibilities to offer quality higher education. In granting the funding, the state takes into account the university's (1) extent of activities (number of students and faculty members, cooperation with private companies, support services, etc.) and (2) quality and results of studies (state examination results of pupils seeking admission, level of internationalization, passed doctoral theses, etc.). To receive funding, the higher educational institution signs a 3-year administrative contract with the Ministry of Education and Research while also entering into annual performance agreements. The performance agreements help the state to defend national interests, such as guaranteeing a sufficient number of graduates in vital specialities (e.g., medical workers, teachers, policemen) or on certain educational levels (doctoral level).

As a whole, the Estonian education in 2013 can be characterized as increasingly structured, centralized, systematic, regulated, and standardized. Stricter control is exercised over performance according to the standards, primarily through the extensive use of accreditation mechanisms and financial means.

Generally, it is characteristic of Estonia that all political forces and social strata share a tradition of prioritizing education. This, however, does not equate to unanimity with regard to educational policy.

Besides economic issues, it is education that has emerged as the focal point of the society. The primary reasons for this include low birth rates, extensive emigration and the consequent decrease in the number of school children, economic recession and the lack of resources, as well as the nation's unreasonable administrative system that remains unreformed due to political opposition.

Bearing in mind the concerns and opinions voiced in the media, parliament, and various educational forums, the Estonian public:

- Continues to view education as a top priority and tends to follow closely the developments in the field
- Is increasingly aware of the deepening gender gaps and other disproportions in education
- Is dissatisfied with the fact that not all children can be assigned to the nursery school of parental choice due to the simple lack of nursery school places
- Recognizes as problems issues such as school violence, school children's insufficient physical and psychological well-being, and poor-value education
- Recognizes increasing educational stratification, unequal access to quality education in the city and in the rural areas and in poorer and wealthier social groups, and rise of private fee-based basic schools
- Is dissatisfied with education funding on the local government level
- Sees employers' dissatisfaction with the existing proportions in numbers of graduates of various specialities and recognizes the employers' view that Estonia overproduces persons with general secondary education and higher education at the expense of vocational training on both levels
- Disapproves the educational passiveness of the unemployed and persons with lower level of education
- Feels solidarity with the teachers in their dissatisfaction with poor salaries
- Feels concern for the expanding labor and study migration and the overall population decline

Some problems are extremely complex, multifaceted, and controversial and have a complicated background. Among those, the hardest to overcome are perhaps the conflicts between:

- Estonia's high level of globalization and Europeanization versus the need to protect the Estonian language and culture
- Standardization and completeness of predetermined learning outcomes versus uniqueness, innovation, and creativity Behaviorist approach versus social constructivist approach
- The education system's focus on economic dynamics versus the marginalization of culture and social sphere
- Cooperation versus competition in education
- Teaching versus research and development
- Internal versus external learning motivation
- Education as an instrument versus education as a value in itself

Unfortunately, problems like this tend to remain largely or completely imperceptible to the wider public and often also politicians who are therefore unable to conceptualize them.

One of the more hopeful recent trends is the so-called smart specialization which promises to solve several issues. At the heart of it is the concentration of funding and knowledge not in independent economic sectors but on activities that penetrate several sectors simultaneously (such as information and communication technology), as well as the reliance on the entrepreneurial process of discovery.

Estonia's qualification framework will likely facilitate the process of smart specialization, providing it with a relatively static and stable foundation. However, its positive effects can only manifest themselves if they do not become an obstacle to innovation, dynamic growth, and development.

Therefore, a uniform and long-term educational strategy can only be implemented if the problems are solved at societal level. Estonia's success so far and the nation's high educational pursuits allow one to be optimistic about the future.

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Wendelin Sroka

The Faroe Islands are located in the North Atlantic, halfway between Norway and Iceland. The archipelago consists of 18 islands, 17 of them inhabited, covering an overall territory of 1,399 km². Until 1948, the islands were a Danish county. Since that time, they have been a self-governing territory of the Kingdom of Denmark, as laid down in the Home Rule Act, passed by the Danish *Folketing* on 23 March 1948. On this basis, the Faroe Islands have their own legislative assembly (*Løgting*) and their own government (*Landsstýri*). The Home Rule Act declares Faroese, a West Nordic language, derived from Old Norse and closely related to Norwegian and Icelandic, as the principal language, and Faroese is used as the language of instruction in the Faroese education system. At the same time, the Home Rule Act stipulates that Danish is learned well and carefully, and Danish may also be used in public affairs. While responsibility for defense issues and foreign policy is exercised jointly with Denmark, the Faroe Islands did not follow Denmark in 1972 in joining the European Community, and they are not a member of the European Union today. Approximately 48,000 people live on the Faroe Islands, 38 % of them in the area of the capital, Tórshavn. The economy of the islands is heavily based on the fishing industry.

By and large, the Faroese education system is very similar to the system in Denmark. The Faroese Ministry of Education, Research, and Culture (*Mentamálaráðið*) oversees education from infant school to higher and adult education. Its responsibilities include the appointment of head teachers, the financing of teacher's salaries, and cooperation with other Nordic countries in the areas of education, research, and culture.

Day care for children from the age of 0 to 6 is offered in private homes and in municipal day-care centers, organized as nurseries or kindergartens. Compulsory schooling begins at 7 years of age and lasts for 9 years. Primary education

W. Sroka (✉)

Deutsches Zentrum für Luft- und Raumfahrt, Bonn, Germany

(Years 1–7) and lower secondary education (Years 8–10) is provided by the *fólkaskúlin*. Today, the *fólkaskúlin* usually also encompasses preschool classes. In the *fólkaskúlin* Danish is taught from Year 3 and English from Year 5. Small villages often have primary schools, but the last 3 years of the *fólkaskúlin* are taught in district schools. Starting in Year 8, the curriculum encompasses both compulsory and optional subjects. Successful completion of the school leaving examination in Year 9 allows pupils to continue their education in an upper secondary establishment either on the Faroe Islands, in most cases in the capital, or in Denmark. Pupils without a Year 9 school leaving certificate can take general education courses in Year 10 of the *fólkaskúlin*. As part of an ongoing settlement development policy, considerable efforts are made to preserve primary schools in the villages and on scarcely populated islands.

Education at upper secondary level has two main tracks: general and vocational. The 3-year general education track, provided by *studentaskúlin*, enables pupils after successful completion to continue their education immediately in higher education. Within this track, students may choose between science-based and language-based programs. A great variety of vocational training programs are offered by a number of specialized colleges in the areas of business, technology, fishery, and health. Most of these programs start with a basic year at college, after which students either continue their studies for 2 more years in this institution or start practical training in an enterprise. Vocational education on the Faroe Islands includes various forms of apprenticeship training. In these cases, a college provides theoretical training, while an enterprise takes over the practical part.

The University of the Faroe Islands (*Fróðskaparsetrið*), founded in 1965, is the main provider of higher education. Today it offers degree courses in five faculties: the Faculty of Faroese Language and Literature, the Faculty of History and Social Sciences, the Faculty of Sciences and Technology, the Department of Education, and the Department of Nursing. The Department of Education, formally the Teachers' College (*Læraraskúli*), provides training for kindergarten and primary and lower secondary school teachers and for social educators. Its history dates back to 1870, when the first teacher training course was started on the Faroe Islands. The *Læraraskúli* was integrated into the University and transformed into the Department of Education in 2008. It now offers 3-year BA programs and 1-year postgraduate programs. Completion of a BA and an additional 1-year program is a prerequisite today to work as a primary and lower secondary school teacher or as a social educator. In addition to the university, the Centre of Maritime Studies and Engineering (*Vinnuháskúlin*) offers training at postsecondary level for professions in the areas of navigation, engineering, and firefighting.

The wish to preserve the cultural traditions of the Faroe Islands and the demands of modern economy have contributed to the development of a great variety of educational opportunities for adult learners. These include courses organized by the evening schools (*kvöldskúlin*), which are established in nearly all municipalities and by the Faroese folk high school (*fólkaháskúli*).

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Matti Meri

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M. Meri (✉)
University of Helsinki, Helsinki, Finland

16.1 History and Social Parameters of the Education System

16.1.1 Cornerstones of Historical Developments

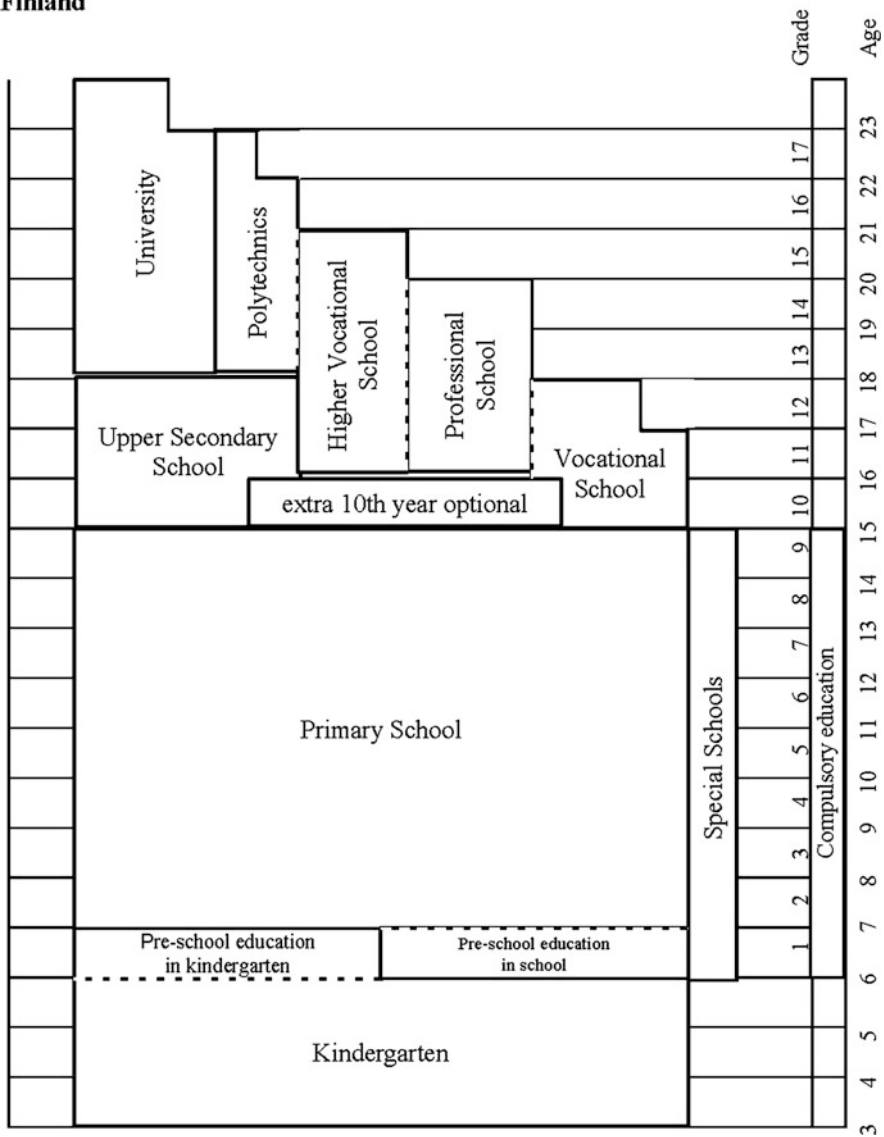
Finland was a part of the kingdom of Sweden until 1809. Education was governed by the Church and was provided in monastic schools and in the cathedral school established in Turku in the thirteenth century. Instruction was in Latin and aimed primarily at training clerics for an ecclesiastical career. The first Finnish university, the *Academia Aboensis*, was established at Turku in 1640. In 1809, Finland became an autonomous Grand Duchy under Russia. The legislation and social system from the Swedish era were preserved, however, during the period of autonomy. The Russian educational statutes were not applied to Finland and internal conditions remained very much as before. Finland also established its own parliament and maintained autonomy in economic affairs.

During the nineteenth century, basic education was greatly developed and expanded. The municipal elementary school was established in the 1860s. From 1898 onward, local authorities had to provide formal educational opportunities for all school-aged children, and compulsory schooling was introduced in 1921. Finland became independent in 1917. From the very beginning, the extension of education to all citizens and all parts of the country, along with continuous efforts to increase the level of education, constituted one of the young nation's central policies. In the Constitution, enacted in 1919, the provision of general compulsory education and of basic education free of charge was established as an obligation. Up until the 1970s, compulsory education was provided in the 6-year primary school. After 4 years of primary school, a part of each age group moved up to secondary school, which was divided into the 5-year lower secondary school and the 3-year upper secondary school. In the 1970s, the comprehensive school, a 9-year compulsory school common to the entire age group, was created on the basis of the primary school and lower secondary school. The network of universities expanded gradually after the Second World War to cover the entire country. During the 1990s, a nonuniversity sector of higher education, consisting of almost 30 polytechnics, was created parallel to the university sector.

16.1.2 Key Phases of Reform and Innovation

Since 1921, education has been compulsory until the age of 16. In 1968, the Parliament decided in favor of an integrated comprehensive school system. Within a period of 5 years, between 1972 and 1977, comprehensive schools for Years 1–9 were introduced. This process drew on educational practice from Sweden and the former East Germany especially with regard to the idea that all pupils should be taught together, independent of their social background, learning capabilities, skills, and proficiencies. The year 1980 saw the introduction of a grammar school, a modular type of the upper level of secondary education. The introduction of a new

Finland



core curriculum in 1994 strengthened the municipalities' and schools' responsibility for comprehensive schools. At the same time, a school-based evaluation was introduced and schools opened up for the information society as provided for in the Basic Education Act of 1998.

16.1.3 The Political, Economic, and Cultural Framework

Finland has been an EU member state since 1995 and is the fifth largest country in Europe (338,000 km²). However, Finland has a population of only 5.3 million people, most of whom live in the south-central and southwestern parts of the country. Finland is a sparsely populated country; there are great differences between the regions with respect to their population density. The capital of Finland is Helsinki; together with neighboring towns, it has nearly one million inhabitants. The language of the great majority, about 94 %, is Finnish. Finland also has a Swedish-speaking minority of about 6 %. The third language spoken in Finland is Sami (Lappish), the mother tongue of approximately 1,700 people (0.03 % of the population). The Sami-speaking population lives in the northernmost part of Finland, Lapland, and its members also have the right to social services in their mother tongue. Foreigners make up 1.7 % of the population. Finland has two national churches: about 87 % of the population belongs to the Lutheran Church, and about 1 % to the Greek Orthodox Church. About 10 % have no religious affiliation. In 1998, 6 % of employees worked in agriculture and forestry, 27 % in industry and construction, and 67 % in services. Nearly half of households have a personal computer; practically the entire primary and lower secondary schools, upper secondary general schools, and vocational schools and colleges are connected to the Internet.

16.2 Fundamentals, Organization, and Governance of the Education System

16.2.1 Current Educational Guidelines and Aims

The main objective of the Finnish educational policy is to offer all citizens equal opportunities to receive an education, regardless of age, domicile, financial situation, gender, or mother tongue. Education is considered to be one of the fundamental rights of all citizens. Firstly, provisions concerning the fundamental educational rights guarantee everyone the right to free basic education; the provisions also specify compulsory education. Secondly, the public authorities are obliged to guarantee all citizens equal opportunities for obtaining education on top of their basic education according to their abilities and special needs and for self-development that is not hindered by economic hardship.

A major objective of the Finnish education policy is to achieve as high a level of education as possible for the whole population. One of the basic principles behind this has been to offer post-compulsory education to the whole age groups. A high percentage of an age cohort goes on to the upper secondary education when they leave comprehensive school; more than 90 % of those who complete comprehensive school continue their education in the upper secondary schools or in vocational upper secondary schools.

16.2.2 Legal Basics and Governance of the Education System

The legal basics for the education system in Finland are the Education Act and appropriate subsequent ordinances. The government is responsible for national education goals and the timetables for general education schools. The framework for the curriculum and standards of learning is provided by the National Board of Education. The highest public body with responsibility for schools is the Ministry of Education. The local administration is managed by the municipal authorities. Although schools enjoy autonomy in respect to their educational work, they still have to meet the provisions of core curricula and the regulations passed by local municipalities. Finland does not have a special monitoring agency that controls the work of schools. Coordination and quality assurance are the responsibility of the educational facilities themselves. Legally defined targets and regular statistical reports ensure that the quality of education can be monitored efficiently.

16.2.3 Relationship Between the Public and Private Sectors

There are approximately 4,200 comprehensive schools in Finland, 86 of which are maintained by private education providers and 30 by the state; the remaining schools are owned by municipalities or federations of municipalities. These state schools include, in particular, experimental schools for teacher training at universities. Each autumn, around 60,000 children start school. In 2008, a total of 580,000 pupils attended the country's comprehensive schools. Municipalities provide 95 % and private organizations 5 % of the general upper secondary education. Roughly 118,000 pupils attend the upper secondary school. Among the providers of vocational education and training, 15 % are municipalities, 35 % federations of municipalities, and 40 % private entities. Approximately 250,000 young people attend vocational school. Polytechnics are either municipal or private. All universities are maintained by the state. Together, polytechnics and universities accommodate roughly 305,000 students.

16.3 Overview of the Structure of the Education System

16.3.1 Preschool Education

Since 2001, all of Finland's municipalities have been providing all 6 year olds in the country with a free place at a 1-year preschool. Prior to the age of 6, each Finnish child had the right to attend a children's day care center up to the age of 5. Attendance here is voluntary. Parents who look after their children at home are financially supported. By 2007, 95 % of 6 year olds were taking part in this voluntary year. Preschool education can take place in nursery schools as well as in comprehensive schools. Compulsory education begins at the age of 7 and lasts for 9 years, concluding with the completion of the comprehensive school.

The aim of preschool education is to improve the learning capabilities of children and to create a playful learning environment that offers inspiring activities and that enables children to develop alongside other children. In practice, preschool children are taught new ideas and skills in a playful manner. This was made possible by the education plan drawn up for preschool education and introduced in 2000. This stressed the fostering of individuality, active learning, and teamwork. The curriculum is divided into themes: language and interaction, mathematics, environment and nature, ethics and philosophy, physical and motor skills development, health, and art and culture.

Preschool education is based on the child's own knowledge, skills, and experience. The focus is on play and generating a positive outlook on life, and the methods and activities deployed should be as varied as possible. From an educational point of view, the working methods used to help children get used to working in teams are highly important. Another key consideration lies in promoting personal initiative which is fundamental to all activities.

16.3.2 The Finnish Comprehensive School

Educational thought in Finland is grounded in the Humboldtian notion that every person, regardless of income, should receive a good and complete humanistic education, which he/she needs for his/her further development. No one can know in advance what kind of education is needed. This can only be determined individually based on one's personal development. This is why comprehensive schools have defined their educational aims as an education toward humanity and the achievement of skills to become a responsible citizen. In principle, this means educating pupils to become balanced people with a well-developed sense of self-confidence who are capable of being critical of their environment.

Children start their comprehensive school education in Finland in the year in which they turn 7. School education lasts for 9 years and ends when pupils pass through the comprehensive school or have attended compulsory education for 10 years. All children living in Finland, including those of foreign citizens, are legally obliged to follow a basic education. This compulsory education can be fulfilled by taking part in lessons at comprehensive school, or children can learn the necessary knowledge and skills in any other way. There is no obligation to attend school in Finland and about 300 pupils per year are taught by their parents. In such cases, adults are responsible for providing textbooks and other school materials. Municipal school authorities monitor the situation to ensure that such pupils meet the learning targets set for basic education and nominate a teacher for these pupils who, together with the parents, assesses the learning progress. Pupils taught at home have to demonstrate their knowledge and skills twice a year.

According to law, lessons at the comprehensive school are free of charge. Teachers are free to choose their own textbooks. Pupils have a free warm meal at school each day. The law also envisages that lessons take place close to the pupil's place of residence. If the school journey is over 5 km long, transportation is provided free of charge.

Basic education focuses on learning the practical and theoretical skills and abilities required for life. Children with learning difficulties should be provided with special lessons. Normally, pupils with special educational needs are integrated in regular classes in the comprehensive school. In collaboration with parents, the school psychologist, and a social worker, the class teacher develops an individual course plan for such pupils. This describes the learning skills and strengths of the learner and defines short- and long-term learning goals and the lesson content should this be different from the standard plan. In addition, it also lists the principles of monitoring success and evaluating progress.

The education of children from migrant families is organized in accordance with their skills and abilities. This takes an account of skills migrant children already have. If necessary, support is given in the pupil's mother tongue. School authorities can also provide mother-tongue lessons. In and around Helsinki, lessons are already given in 43 different languages. Pupils may also have religious education in their own religion when requested by three or more families.

The basic education syllabus includes at least the following subjects: mother tongue and literature (Finnish or Swedish), the other national language (Swedish or Finnish), foreign languages, mathematics, physics, chemistry, history, social studies, sport, music, art, handicrafts, home economics, religion, values and standards, biology, geography, and environmental studies. In addition, pupils can choose a variety of electives in line with their own interests. The first foreign language begins in Year 3. Most choose English (96 %) and then Swedish (1 %), German (1 %), French (1 %), and Russian (0.2 %).

The school year in the comprehensive school lasts for 190 days. The school year ends in spring, when May turns to June with a celebration of spring that starts the summer holidays. The new school year usually starts in mid-August. During the school year, there are several holiday periods: the autumn holiday in October, 2 weeks over Christmas and New Year, and a week of winter to sports holiday in February/March. School is also closed on public holidays.

Although the comprehensive school does not finish with a final examination, completing the comprehensive school program entitles pupils to choose between the general upper secondary education and vocational upper secondary education. To be able to do this, marks in their final comprehensive school report should not be poor.

In the lower classes of the comprehensive school (Years 1–6), the class tutor gives most of the lessons. Specialist teachers may be called upon to teach foreign languages, sport, art, music, and handicrafts. In the upper classes, subjects are taught by specialists. Primary school level teachers and specialist teachers are trained in a 5-year master's program (requiring 300 credit points).

16.3.3 Upper Secondary Education

Each year, 56 % of all pupils choose to continue their education at the upper secondary school after Year 9 and 35 % in a vocational school. The upper

secondary school provides general education for pupils who are usually aging from 16 to 19. The upper secondary schools can choose their pupils themselves based on school success in the comprehensive school. Attendance here can last between 2 and 4 years depending on the pupil's pace of learning and progress, which may vary quite starkly. Roughly 19 % of pupils need more than the 3 years normally envisaged to complete upper secondary education. In 2008, there were 413 upper secondary schools in Finland, accommodating 118,000 pupils, 57 % of whom were girls. The majority of upper secondary schools are small, with less than 300 pupils.

The general aims, the division of learning into subjects, and the issues and principles of counseling are determined by the Ministry of Education and the government. The board of education acknowledges the fundamentals of the curriculum and finalizes the learning objectives and the key content of lessons. Municipal authorities use this as a basis to provide information to schools on how the curriculum for a specific school is to be implemented.

Lessons are not organized in a year-based system. Instead, the upper secondary school works on a course-based system comprising obligatory, consolidating, and applied units of learning. There are no classes. Each pupil himself/herself selects individual courses and the pace of learning throughout the upper secondary level. Pupils have to complete obligatory learning units and each pupil is responsible for selecting a sufficient number of courses. Each pupil has to learn at least three foreign languages. The teaching program is divided into 75 courses, 45–49 of which are compulsory. Some upper secondary schools specialize in a particular subject or field such as mathematics, natural sciences, languages, art, sport, and theater. Over 40 % of pupils select long-term courses in mathematics.

Upper secondary school ends with a final, nationwide, standardized examination that takes place at the same time for all schools. The national matriculation examination consists of tests in the mother tongue (Finnish/Swedish/Sami). A pupil can choose a further three or more examinations from subjects such as a second national language (Swedish or Finish), foreign languages (long-term or short-term courses), mathematics, or general studies. In the general studies examination, candidates can choose questions from a variety of subjects or focus on just one specialism (biology, geography, chemistry, physics, history or social studies, religion, values and norms, philosophy, psychology, or health studies). In addition to the mandatory subjects, candidates can also take exams in electives. Foreign language exams have a listening comprehension and a written part.

Exam questions are drawn up each year by the National Matriculation Examination Board which reports to the Ministry of Education. The examination board is made up of university professors who also evaluate the answers of all candidates in line with uniform criteria. Having passed the matriculation exam, pupils are entitled to wear a white cap at their graduation ceremony which takes place in spring or in autumn.

The successful completion of the upper secondary school education provides pupils with the general qualification to apply to a university or to an establishment for higher vocational studies. Therefore, the main purpose of the upper secondary school is to prepare pupils to qualify for all forms of higher education. There are also upper secondary schools for adults in addition to the usual day schools.

Lessons here usually take place in the evenings. Anyone passing the final examination through this channel is also entitled to register at university. The requirements for pupils attending the evening upper secondary school are the same as those attending day school.

16.3.4 Vocational Upper Secondary Education

There are a variety of options open to pupils wishing to obtain a basic vocational education. In principle, young people can follow basic vocational education in special vocational schools as well as in apprenticeship training. The completion of an initial vocational qualification generally takes 3 years depending on the skills and abilities of the pupils. A 3-year vocational qualification gives the right to progress to higher education. The acceptance procedure for basic vocational education is regulated by the state. Vocational schools select their new intake based on previous learning success, but some facilities also carry out their own special entrance examination. Vocational education in Finland is characterized not only by theoretical education provided in several blocks of learning in the school's own workshops but also by work experience in companies. Basic vocational education is offered by municipalities, local authorities, as well as private institutions. Programs are free of charge.

The curriculum comprises specialist contents such as the mother tongue, the second national language, mathematics, physics and chemistry, many kinds of social studies, physical education and health, and arts and culture. The courses primarily aim at the acquisition of vocational skills necessary for work. According to law, the purpose of vocational education is to teach the skills required for professional life and to provide pupils with the abilities to exercise a professional activity independently. All told, there are 75 professional avenues. The final examination also includes a final major piece of work.

An apprenticeship is a fixed-term agreement between the training facility, the apprentice, and the employer. The theoretical part of the program is coordinated with the practical work provided by the employer. The length of such a program varies from 6 months to 4 years. The program is rounded off with a "demonstration" exam in which the apprentice demonstrates the theoretical and practical aspects of his/her profession, regardless of the nature of the professional skills acquired. During the apprenticeship, the apprentice is paid a salary that is usually equivalent to the minimum wage for the field. The employer receives compensation from the government for the costs of training the apprentice.

16.3.5 Higher Education

The Finnish higher education system consists of universities and polytechnics (AMK institutions). Universities carry out research, teaching, and social activities; however, the core of university-based activities lies in combining research and

teaching. Students can obtain bachelor's and master's degrees as well as academic, postgraduate doctorates. The completion of a bachelor's degree (comprising 180 credits) takes 3 years and a master's degree (300 credits) a further 2 years. Doctorate programs require students to write a dissertation and document their in-depth studies, which need to total 240 credits. Polytechnics are mostly multidisciplinary, regional, vocational higher education facilities whose activities are characterized by their close proximity to the working life. Final examinations are also professional higher education qualifications that normally require 140–160 credits. Like universities, bachelor's degrees require 180 credits.

16.3.6 Polytechnics

The Finnish polytechnic system was set up during the 1990s. Courses are characterized, as described above, by their proximity to the working life and aim to prepare students to activities in professional fields within the various disciplines. Students must have completed either the matriculation examination or an upper secondary level vocational qualification. Polytechnics select their students themselves; applications take place through the national joint application procedure.

Courses usually last for 3.5–4 years and provide professional education in the following sectors: natural resources, technology and traffic, communications, business and administration, tourism, catering and institutional management, health care and social services, culture, education, and leisure and sport. The study program consists of basic and professional courses, optional studies, theoretical and practical courses to boost occupational skills, and the completion of a thesis.

Polytechnics are not administered by the state, but by municipalities and private organizations. However, state funding does meet 60 % of the financial requirements of the polytechnics. Universities and polytechnics can usually accommodate up to 60–70 % of an age cohort in the country. The aim of the government is to provide higher education to an ever-growing proportion of the population.

16.3.7 University Education

University education is the oldest form of education in Finland. The first university, the Royal Academy of Turku, was founded in 1640 in Turku, the former capital of Finland. Following the great fire in Turku and the loss of the city's status as capital in 1812, the university moved to Helsinki to become the "imperial" university.

University activities are based on the principles of academic freedom and the autonomy of universities. The latter means that the universities enjoy a wide-ranging decision-making authority to govern their own affairs. Faculties can determine their own examination regulations, curriculum, and entrance procedures for new students. Furthermore, universities can decide on the number of students to accept in the various disciplines. There are sufficient places at the universities to accommodate 21,000 new students (roughly 33 % of an age cohort). Competition

for student places in higher education is intense: each year between 6,500 and 8,000 young people apply for 1 of the 800 places to study to become a primary school teacher, for example.

Legally, universities are responsible for fostering free research and academic and artistic education. They should also provide teaching of the highest standard on the basis of findings of academic research. University activities in research, training, and teaching should also meet high international standards and take account of ethical principles and good academic practice. All 20 universities in Finland are state run and largely state funded. In 2007, 150,000 students were following bachelor's or master's programs at Finnish universities. This includes 4,200 foreign students. Women receive over half of the degrees awarded at all levels except the doctorate. Women represent over 80 % of the students in health science, veterinary medicine, pharmacy, and education.

The network of universities covers all regions of the country from Helsinki to Rovaniemi including southern Lapland. Finland's university includes ten multidisciplinary universities, three universities of technology, three schools of economics and business administration, and four art academies. In principle, university study is open to all and students do not have to pay for tuition.

16.4 Developments in the Current School System

16.4.1 Language Programs

Finland has two official languages, Finnish and Swedish; both are obligatory subjects in the comprehensive school. For the majority, Swedish is in practice a foreign language, while most of the Swedish-speaking population are bilingual. On top of this, pupils should be able to speak a world language. English is the first foreign language that 95 % of parents choose for their children, followed by 3 % for German and 1 % for French. In 2008, some schools began to offer Russian. In total, less than 300 pupils started to learn Russian.

About 20 % of the lower secondary level pupils learn German and about 10 % French, mainly as an elective. The language program is thus substantial in size and occupies a large part of the curriculum. In practice, this means that there is less room left for the other subjects. The struggle for course content arises over and over again whenever a new curriculum is developed. Discussions are currently rife, concerning the role of Swedish and religious education. Criticism has also highlighted the position of such subjects as music, art, sport, and handicrafts in the curriculum with many people sharing the opinion that too little time is allocated to these subjects.

16.4.2 School-Based Curriculum

Since the 1990s, a great deal of work has taken place in curriculum planning. In the past, much was prescribed by the national school administration.

The curriculum for general education schools was determined centrally. Now, the National Board of Education prescribes only a loose curriculum framework, and the schools write their own curricula. This reform emphasizes the role of the teachers; in practice, teachers have become curriculum-makers. As a result, they have been engaged in extensive discussions on the purpose of schooling and the aims and goals of the curriculum. Parents have also been invited to these discussions, and in some cases, pupils have also had the opportunity to participate in the creation of the curriculum. A nationwide evaluation process has been introduced to ensure the implementation of the curriculum. The annual obligatory national evaluation process:

- Does not include a nationwide inspection of the whole population of school year or comparative tests for all
- Assesses 100–200 pupils from each school who are chosen as a representative selection, with roughly 5,000–8,000 pupils of an age cohort being evaluated
- Makes its selection based on economic, regional, social, and gender criteria and is obligatory
- Alternates between mathematics and mother-tongue language and literature each year, while other subjects are also added
- Requires about 18 months between the preparation of the evaluation and the presentation of the results (schools receive initial results much earlier)
- Does not compile ranking lists nor does it publish the results of the individual schools
- Publishes national averages with each pupil receiving his/her own results
- Provides schools and teachers with precise instructions on how the tests assess knowledge and skills in a particular subject
- Encourages both the school and its maintaining body to use the results and their analyses as the basis for further school developments

16.4.3 Personal Curriculum and Guidance

More than before, teachers are being called upon to develop a personal curriculum for each pupil and are better equipped to implement it. Such a plan contains a description of the learning skills and strengths of the pupil, the short- and long-term aims of learning, a list of course content if this is different for the learner than in the standard curriculum, basic information on subsequent controls, and the evaluation of the pupil's learning progress. If supportive measures are required, such measures and how they are monitored are also described. Such a plan offers great support to teachers in the planning of their lessons and forms the basis for individualization and differentiation in the educational process. A personalized curriculum also permits achievement to be personalized.

In the first 4 years of school, children only receive an oral report; later marks can, and from Year 7 must, be given. Oral reports only allow personal development plans to be compared, as is it not possible to compare pupils on the basis of

achievement. Even the allocation of marks has to take account of the individual situation of pupils to avoid sending out discouraging signals.

Each comprehensive school has a committee for pupil care and guidance which meets at least once a week. The committee consults on the best ways to help pupils with cognitive, social, or emotional problems and tries to find out the causes of learning difficulties in order to develop a plan to best optimize support and cooperation with parents. If weaknesses cannot be remedied despite all the effort, an individual curriculum with lower requirements is drawn up.

16.4.4 Profile Education and Competition Between Schools

Parents and pupils can choose “their” comprehensive school. One key factor in the selection process is the curriculum of the school. Pupils can emphasize certain language programs or musical subjects in the curriculum, and this generates a degree of competition between schools. Competition and profiling operate in society and in some municipalities. As a result, some small schools may have to close and pupils have to travel further to school.

It is also necessary to develop a curriculum for all schools which takes better account of interdisciplinary issues in all classes.

16.4.5 Multicultural Education and Upbringing

Finland has been an extremely homogeneous country. There are only few immigrant pupils at Finnish schools, amounting to between 2 % and 3 % of the school population. Most of these children come from Somalia, Estonia, Russia, or the former Yugoslavia. Immigrant pupils have the right to have 2 h lessons per week in their mother tongue. In addition, they receive extra lessons in Finnish. Children of migrant families can be taught for 1 year in preparatory classes of no more than ten pupils. In the future, the number of immigrant children in Finland is expected to grow. The Ministry of Education has drawn up a precise forecast of needs for teachers who are capable of teaching such immigrant children.

16.5 New Developments

On 28 June 2012, the government issued a decree on the national aims for school education and for the basis distribution of school lessons. The decree defines the aims for preschool education, education in comprehensive schools, upper secondary education, and preparatory school education. It also contains details of the distribution of lesson in school and a series of more precise provisions including language lessons and lessons for those pupils who need particular support.

The National Board of Education is preparing the core curriculum for preschool education, for comprehensive school education, and at the upper level of secondary

education and is expected to present its results at the end of 2014. Municipal school authorities will write local curricula in conjunction with schools based on this new core curriculum. The new curriculum is to be applied to each comprehensive school from the beginning of the 2016/2017 school year.

The country has been experiencing a demographic shift with the rural population increasingly moving to urban centers. Instead of having separate schools, municipal school authorities have established new integrated comprehensive schools (for Years 1–9) in the belief that such a type of school is educationally more effective. This has led to the closure of many lower-level (village) schools for Years 1–6. Such schools had 2–3 teachers for 15–20 pupils. In 1990, Finland had 2,134 such small schools accommodating 50 pupils or less; in 2010, there were just 646 schools. In 2013, a total of 2,644 lower- and upper-level schools accommodated 520,000 pupils.

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W. Hörner (✉) • G. Many
University of Leipzig, Leipzig, Germany

17.1 History and Social Parameters of the Education System

17.1.1 Cornerstones of Historical Development

The French educational system received its theoretical foundations through the ideas of the French Revolution of 1789. The basis of its real shape, however, was conferred only at the end of the nineteenth century by the education acts of the Third Republic concerning, in particular, primary education. Indeed, the promoters of the French Revolution did not have the financial means at their disposal to realize their ideas concerning “education for all.” The priority of educational policy under Napoleon’s regime, however, was rather the extension of secondary education (the *lycée*) in order to train the elite for the new state.

The first attempts to create a common school for all go back to the end of the First World War. After the Second World War these endeavors gained fresh impetus. From 1945 to 1959 there were many attempts at a great school reform, but these propositions did not receive a majority in parliament. It was only at the beginning of the Fifth Republic (the era of de Gaulle) that a rather pragmatic process of secondary school reform was initiated in small steps. At its provisional end there was a new Education Act in 1975, promoted by the Conservative majority (under President Giscard d’Estaing). The new act provided a school system organized at different horizontal levels. Its core was a nonselective secondary school for all young people, embracing lower secondary education. After this common core a ramified system of upper secondary education embraced different tracks of general, technical, and vocational education. This fundamental structure was only modified in certain details during subsequent years.

17.1.2 Key Reforms of the Last 30 Years

Recent school history has been determined by the effects of the reforms in lower secondary education, the overall assessment of which remains controversial. Seen by some as an educational breakthrough and the definitive end of the divide in schooling in two separate blocks determined by social situation, is criticized by others as a mere formality in structural reform without any pedagogical backup or by very conservative circles as plainly putting the efficiency of schooling at risk. It actually appears that the new structures have not brought about the automatic disappearance of all problems. Educational failure and resignation were not banished, in fact a socio-geographical dislocation arose: although the *collèges* in migrant ghettos were undifferentiated paradoxically, they were generally dominated by violence-prone, demotivated, socially discriminated young people with limited prospects in life. Schooling has been trying to master the problem with intermittent success since the 1980s by creating “priority areas of education” (*Zones d’Éducation Prioritaires – ZEP*).

France

					Grade	Age
				Elite institutions of H. E. (Grandes Ecoles)	17	23
	University	IUT (Institutes of Technology)		Preparation courses for the Grandes Ecoles	16	22
			Section of higher technical education		15	21
					14	20
					13	19
	Upper secondary academic tracks		Vocational school		12	18
				11	17	
	Stage of orientation			Special school	10	16
	Intermediate stage				9	15
	Stage of adaption				8	14
	Lower secondary school				7	13
	Cycle of deepened learning			Compulsory education	6	12
	Elementary school				5	11
	Cycle of fundamental learning				4	10
					3	9
	Cycle of first learning			2	8	
	Pre-school			1	7	
					6	6
					5	5
					4	4
					3	3

This had become a particularly urgent action because school reform had targeted a general increase in the level of education that did not include any new segregation. The New Education Act (cf. Loi 1989) dated 10 July 1989 but passed on symbolically 14 July 1989 (bicentenary of the French Revolution!) declared education a national priority and aimed to bring 80 % of an age cohort to matriculation level by the end of the millennium. This “democratization” also affected the teaching profession: teacher categories were unified, and a new level of common (basic) training for all categories of teachers was created in new university-based teacher training institutes (IUFM). The reform phase of the 1980s/1990s also saw an attempt to shift the development of curricula, which had previously been the privilege of the Inspectorate General, to a broader society basis in commissions (historical predecessors, cf. Hörner 1979).

One of the signs of greater “Europeanization” of education was the introduction of foreign language teaching in the primary school in the 1990s. The Orientation Act of 2005 strengthened the goal of equality of opportunity – *égalité* being one of the three guiding principles of the French society since 1789 – by setting the target of having 50 % of an age cohort graduating from university while at the same time aiming to combat violence in schools and having “respect for the values of the Republic” as a special educational goal. The structural integration also aimed at increasing the social integration of children and young people from migration families. The new Orientation Act from July 2013 expressly picked up on the issue of “respect for the values of the Republic” but increasingly viewed this in connection with human rights.

17.1.3 Political, Economic, and Cultural Framework of the Current Education System

As in many industrialized countries in Europe, a large proportion of the population in France live in towns and cities. On the edge of these conurbations are a large proportion of immigrants. However, immigration in France has its own morphology: as an old colonial power, one-third of the immigrant population are actually French citizens. Given the country’s stricter immigration policy, the number of new immigrants has become stable in the last 30 years. The first generation of immigrants that made up 8.1 % of the French population in 2004 were mainly from Southern Europe (Portugal, Spain, Italy); afterward they came from Maghreb and from sub-Saharan Africa. Unemployment among immigrants from the Maghreb countries and black Africa of 16.4 % is twice as high as for the domestic population. Sixty percent of immigrants are concentrated in three regions – the working-class areas of the suburbs of Paris, Marseille, and Lyon. These quarters are often classified as areas of educational priority (ZEP), and the riots in these immigrant suburbs in winter 2005 again brought this problem to the attention of the public (Hörner 2008a).

The troubled suburbs have become more troubled given the meritocratic nature of the values of the Republic, in which education is given greater symbolic value as a means to attain the highest possible social position: The logic behind this is that everyone can try and through an education system that is open to all achieve the position they have “earned” in society. The fact that French sociologists have demonstrated again and again the subtle social mechanisms by which school serves the reproduction of existing social conditions is not a contradiction but rather complementary to the first observation (see also Brauns 1996).

In the collective awareness of the French nation, education has a pronounced value. This value has its historical roots in the sense of cultural mission of the French nation that goes back to the era of Enlightenment. Indeed, this idea of Enlightenment has a universal range: the “light of reason” must shine for everybody in the same way without distinction. This cultural self-consciousness is closely linked to French language, literature, and philosophy. The great value of language-based education as an expression of national culture is indicated by the broad public debates of the relevance of particular issues relating to the final examination (*baccalauréat*) in French language and literature.

Amazingly, this uncontested value of school is also grounded in the perceptions of French pupils. Comparative studies have shown that pupils in French schools are significantly more content with their schools compared, for example, to German pupils (Czerwenka 1990). Of course the significance school has in the heads of pupils has its equivalent in the heads of parents, manifested in the numerous parent associations. These are ready to organize local and even national school strikes if the conditions of learning in the schools are not satisfactory.

Within this logic, teachers would normally be expected to have an important social role. However, the reality in France is somewhat more complex. Although all teachers are civil servants, they are still entitled to go on strike. This willingness to strike and their strong union organization are key indicators of their professional identity. Despite their differences and their occasional conflicts, the various teachers’ groups have a similar notion of their profession. Nevertheless, the teaching profession does not enjoy high levels of prestige in a population that places such a high value on schooling. It has become a middle-class profession, offering upward social mobility for children of working-class parents and additional income for women. Salaries are 10–20 % down on many professions in both private and public sectors requiring the same level of education. The 1990s saw a significant increase in the number of teachers being employed. Numbers have stagnated somewhat since then. Since 2008 however, the number of new appointments has fallen considerably despite the persistent high birth rate – the highest in the EU. This could lead to potential tension given the priority society accords to education. The fall in the new appointments continued to 2012. However the new Orientation Law of 2013 envisages 60,000 new appointments by 2017. The change in education policy reflects the change of government in 2012. Despite the austerity programmes instigated to counter the European financial crisis, the government is attempting to keep the numbers of teachers at a relatively high level.

17.2 Fundamentals, Organization, and Governance of the Education System

17.2.1 Current Educational Policy and Goals of the Education System

Ever since the modern French school was constituted at the end of the nineteenth century, its fundamental principles have been closely tied to the concept of the state: education is compulsory (*obligatoire*), free of charge (*gratuit*), and secular (*laïque*), i.e., ideologically neutral. Of these principles, only the French notion of *laïcité* (secularity) has been called into question again and again but confirmed as well. “Laïcité” was seen as a process of secularization in a common nondenominational morality. It was the ideological foundation of the young republican school against the influence of the conservative powers of the Catholic Church. Secularity is not an expression against religion per se, it tolerates it in the private domain and allows for religious instruction outside school. Islamic Koran schools make use of such an opportunity, for example.

The central aim of French schooling is to educate all children from preschool onward without any difference of whether they are French or foreigners. This common foundation of compulsory education is encapsulated in the 2005 Education Act. The common basis is made up of seven skills: mastering the French language; practicing a foreign language; key elements of mathematics, natural sciences, and technology; mastering standard IT and communication techniques; humanities; social skills and citizenship; and personal autonomy and initiative.

To be able to reach these goals, the Education Act of 2005 strengthened educational policies anchored in the Education Act of 1989: primarily, that by 2000, 80 % of a cohort should complete secondary education (i.e., have completed 12 years of schooling). At that point in time, this meant virtually doubling the number of school graduates – in 1986 only 47 % of a cohort actually attained the baccalaureate. By these plans France followed targets of educational policy as we find them in Japan or in the USA. Despite the fact that this goal has not quite been reached and that the secondary school completion rates have stagnated somewhat since 2000, the majority conservative government at the time held tight to its goal of high completion rates to be able to achieve a high level of students enrolled at university (50 % of a cohort).

“Secondary education for all” as a “national aim” in France constitutes a political consensus, independent of party political orientation. However, two aspects need to be rendered more precisely. On the one hand, the target of 80 % refers not to the actual number of pupils passing university entrance qualifications but to the number of pupils in a school year that is qualified to take the examination. On the other hand, the goal also includes pupils taking a technical or vocational examination at this level, which make up about half of the potential number of pupils passing the examination. The 80 % targeted does not only refer to pupils passing general education final examinations.

Since the 1960s the French education system has been opening up more and more internationally. There is an extensive exchange programme with Quebec and Germany, and since the fall of the Berlin Wall with other Central and Eastern European countries. Since as early as 1981, there have been international sections at primary schools, *collèges*, and *lycées* that offer bilingual lessons. Since 1996, pupils learn a foreign language from Year 3. France was the country that initiated the Bologna process and, in 2004, the first country to implement it (see below). There is also a very active exchange programme and more than 10 % of students in France come from abroad. Ultimately, France plays a key role in international organizations such as the OECD, the UNESCO, and the Council of Europe, all of which promote activities in educational research and policies.

17.2.2 Legal Foundations of the Education System

The right of access to education and vocational training is accorded by the French Constitution of 1958. In the 1789 tradition, instruction in schools has to be without any influence of the churches (private schools excepted), and schooling on all levels of the educational system is organized or at least controlled by the state.

The latest legal basis of key significance is the “Orientation Law on the Future of Schooling,” the fundamental legal text is still the Education Act of 10 July 1989 (Loi 1989). The Act of 1989 defined education as the “first national priority” (Art. 1, 1). Central curricula are laid down in law; however, the procedure of compiling a curriculum by a school council is supplemented by the preparatory work of an independent committee of experts (Article 6). On the school level the divergence to the centralist model is even clearer: individual schools will have to elaborate individual development plans (*projets d'établissements*) which allow particular profiles of the individual schools. The 2005 Act introduces the description of a basis of skills at the end of compulsory schooling, strengthens foreign language instruction, and introduces (controversial) measures against violence in schools. The functioning of universities is essentially organized by a Higher Education Act from 2007 that is gradually being implemented. The fundamental legislation in the field of further education and vocational education dates from 1971 and concerns initial professional training and continuing education for employees.

The French state is highly important in its role of organizing and controlling education. Approximately 80 % of all schools are directly maintained by the state, with the state having its own representatives and inspectors at regional level. Besides state schools, there are about 20 % (mostly Catholic) private schools, distributed very unevenly across the regions (e.g., up to 40 % in Brittany). Moreover, the state has the monopoly of controlling examinations and awarding diplomas. Graduates of private vocational and general educational facilities are subject to state examinations.

Responsibility for the construction and maintenance of primary schools was transferred to the municipalities as early as 1886. Since the notable efforts made in

the 1980s to deconcentrate French administration, schools have become “local public instructional institutions” (*établissements publics locaux d'enseignement – EPLE*). This means that only the teachers’ salaries are in the responsibility of the central state; all material costs have to be assumed by local bodies. The *départements* are responsible for the lower level of secondary education (*collèges*), the regions for the upper level of secondary education (*lycées*). From 2004, responsibility for non-teaching personnel has been transferred to the *départements*. Head teachers at secondary level have a double function: on the one hand, they are representatives of the Ministry (the central state) and therefore responsible for the execution of central orders; on the other hand, they have to execute the decisions of the administration council, the “parliament” of the school (*conseil d'administration*) chaired by the head teacher.

The administration council is composed in equal parts of teachers, students, parents, and representatives of the school administration. It has the right to make decisions about strictly defined issues like the school budget, the school profile (*projet scolaire*), etc. The school’s pedagogical autonomy resides essentially in the splitting up of the global number of teaching hours given by the school administration, the division of the students in classes and learning groups, the selection of curriculum content specific to the school profile, and the definition of optional learning activities. Thus, a compromise between the central structure of the national curriculum and the implementation of particular school-centered curricula is attained. It is striking, however, that most of these domains of “pedagogical autonomy” are linked either to optional curriculum elements or to the scope given between the minima and maxima in the timetables.

17.2.3 Financing

Despite the decentralization of responsibility for “external school affairs,” the budget of the Ministry of Education remains the largest item of national expenditure. Since 1985, the financial contribution of the local communities has increased, and the contribution of the Ministry of Education has accordingly decreased. Expenditures incurred by families have also reduced in the light of free services and scholarships; in contrast, the expenditure of the facilities has increased. In 2006, the overall costs for education amounted to 6.8 % of GDP – in 1995 it was 7.5 %.

The average annual expenditure per pupil/student amounts to 7,140 € – 4,990 € for preschool/primary sector, 8,790 € for the secondary sector, and 9,220 € for higher education. There are huge differences within higher education: On average, 7,720 € were spent on each university student, with 14,250 € for a pupil in a *Classe Préparatoire*. Expenditure has experienced a downward trend since 2004, but as far as the primary and secondary sectors are concerned, it is still higher than expenditure in Germany, for example.

17.2.4 Relationship Between the Public and Private Sectors in the Education System

In addition to public (state) schools, roughly 20 % of schools are in private (mainly Catholic) hands. Both sectors have lived in more or less stable peace since heated arguments about the nature of private education took place at the end of the nineteenth century. Teachers at private schools are paid by the state provided the private schools accept public curricula and submit to state inspection and provided the teachers have the same qualifications as those in public schools.

Private education at the secondary level is particularly active in preparing pupils for the *baccalauréat*, a fact that gave to these schools the nickname of *boîte à bachot* (baccalaureate boxes). There are also private higher education facilities, seen as a supplement or alternative to the public *Grandes Ecoles*. The state still retains its monopoly concerning final examinations and their validation. In 2005/2006, 13.8 % of pupils/students attended private education facilities, the same figure as 10 years previous with more than 20 % of pupils attending private secondary schools and less than 6 % attending private universities.

17.2.5 Quality Management

Quality assessment of lessons and results take place at a number of different levels (Hörner 2005). The most well-known assessment of results is the national (i.e., centrally compiled) final examinations, best represented by the *baccalauréat*. In the collective awareness of the French people, the anonymous character of the examination is the guarantee of its objectiveness. It distinguishes not only the successful students but their schools and their teachers too. Another old mode of quality control is the school inspectorate (*Inspection Générale* bzw. *Régionale*) visits during classes. The inspectors have to evaluate the quality of teaching and to make suggestions for its improvement. In addition, they are an important criterion as for the promotion of teachers.

The most important newer form of student evaluation is the national assessment of student performance introduced in the 1990s. The assessment consists of national target-based tests at the beginning of each new learning cycle, indicating if the students have reached the educational objectives of the previous cycle. These assessments are made in an alternating rhythm at the beginning of the Years 3 (consolidation cycle), six (*collège*), and ten (*lycée*). These assessments are not to rank the students' nor the teachers' individual performances but to inform the teachers of the new classes about possible deficiencies, in order to enable them to attack these problems by means of more individualized and modularized teaching. Moreover, these evaluations have a second function. They may assess the performance of the key elements of the national educational system as a whole.

The Education Act of 1989 stipulated that all teachers are to be trained in new institutions, *Instituts Universitaires de Formation des Maîtres* (IUFM), following

their bachelor degrees (France has retained the old name *licence* for first degrees). These institutions have been gradually integrated in universities since 2006. Created in the 1990s, the institutes have a double function: they have replaced the former teacher training centers for primary school teachers (*écoles normales*); and they have also replaced the regional centers for practical training for secondary school teachers (*centres pédagogiques régionaux*). All teachers – from preschool to higher education – carry the title *professeur*. Previous trainings took place in two stages: in the first year at IUFM (which is not mandatory), all categories of teachers prepare for the special competition (*concours*) giving access to practical training; and the second year at the IUFM is dedicated to practical training. In connection with the Bologna reform from 2010, the competition examination was placed at the end of the second year of the master's programme. The teaching practice was integrated in the 2 years of the programme. This did away with the probationary period. This reform is aimed at making teacher training more professional.

An exception to the “harmonization” of teaching levels is the *agrégation* (a special professional level for upper levels of secondary education, preparatory classes for elite universities, etc.). This *concours* is significantly more difficult and is only possible following a 4-year period of academic training. In other words, the (voluntary) preparatory course at the IUFM and the practical training follow 1 year later. However, there are a number of advantages in this compared with “normal” secondary school teachers (higher salary, fewer teaching hours, possibility of changing to a university, etc.).

Head teachers are appointed in an internal selection procedure (*concours interne*) that is open to teachers with at least 5 years of experience. Teachers can prepare for the procedure in a special 6-month training course. The professional work of a head teacher today balances the tension between management and educational functions. Whereas in the past head teachers were seen as managers – especially in the light of maintaining partnerships with external bodies, particularly with respect to funding – more recently, new models of quality assurance in teaching have brought educational functions back to the fore, with the head teacher seen as the leader of an educational team.

17.3 Overview of the Structure of the Education System

17.3.1 Idiosyncrasies of School Organizations

School in France covers the whole of the day – there was never any other type of school in France (Kodron 1991; Hörner 2008b). However, following the old secular tradition, children have 1 day of the week free to enable them to attend confessional religious lessons outside school. Because older pupils have more to learn, this option is reduced to a single free afternoon per week. Lunch facilities are provided for pupils.

Another consequence of the full-day schooling is the differentiation between educational and more disciplinary tasks. To supervise and look after children during non-teaching individual study, French schools also employ their own educational

supervisory staff (*conseiller d'éducation, adjoint d'enseignement*, etc.). This educational support team significantly relieves teachers of extracurricular work and is often a side job for (advanced) students in teacher training.

17.3.2 Preschool Sector (ISCED 0)

It would be impossible to think of the French education system without including its preschool sector. The need to provide small children with care while their mothers worked was identified as early as the nineteenth century. In the first half of the twentieth century, there was a gradual transition from a care center with primarily socioeconomic goals (relieving working mothers) to an educational facility fostering child development. Given its organizational integration in the school system, the *école maternelle* also prepares children for the transition to compulsory schooling.

Preschool education is offered free of charge for all children from 2 to 6 years. Even if it is not compulsory, almost all children (99 %) from 3 to 6 years and 12 % of all children between 2 and 3 years attend the *école maternelle*. The preschool system is successful because it provides children with an educational facility free of charge for the whole day. The development of preschool facilities in France has inestimable positive social consequences. The inclusive character of this educational policy is an efficient measure to promote social and family policy: indeed France combines a high rate of working women and a high level of education among young women, with high birth rate for which it ranks top in the European Union.

The teachers in the *école maternelle* have the same status and the same type of teacher training as the primary teachers. Since a common teacher training structure was introduced in the 1990s, all teachers in preschool education in France may be called *professeurs des écoles maternelles*.

The fundamental school-based structure of preschool education is illustrated by the fact that it has its own structured curricula – which however only apply for children from the age of 4. These curricula guide children from free play to structured play and ultimately and gradually introduce techniques of independent learning. These aim to foster all aspects of child development – psychomotor, social, and intellectual.

The focus of the curricula is on fostering language and social skills especially those of socially and economically disadvantaged children. Accordingly, official texts describe the key tasks of the *école maternelle* as promoting talent and bridging family deficits. However, recent empirical research has also showed that there are significant shortages in this area.

The content of the *école maternelle* and primary schools have been closely linked since the 1990s. Thus, the first 3 years of the *maternelle* for 2–5-year-olds constitute their own learning cycle (*cycle des apprentissages premiers*). The last year of pre-primary education and the first 2 years of the primary school build a bridge between the two institutions in the sense that together they constitute the “cycle of

fundamental learning” (*cycle des apprentissages fondamentaux*). This linking aims at simplifying the transition between the two schools and involves the close collaboration of teachers from both facilities (cf. for the following descriptions of the school system Auduc 2012; Peretti 2004; Toulemonde 2006; Hörner 2011).

17.3.3 Primary Sector (ISCED 1)

The primary school thus comes in the middle of the second learning cycle of the overall “preschool/primary school sector.” This is followed by the third cycle – the cycle of consolidation (*cycle des approfondissements*) – that comprises Years 3–5. It is clear that the three cycles of learning cement the structural and functional links between preschool and primary school.

The innovation that is the classification of learning cycles not only serves to improve the links between preschool and primary school, it also allows for flexibility of learning: the classification in cycles allows primary school pupils to learn at their own pace, covering the material of 3 years either slower (in 4 years) or even quicker (in 2 years). This makes it possible to circumvent the social stigma of the past in having to repeat a year and to avoid the negative educational effects of learning all the materials for a school year again, which does not take account of what was really mastered and what not. To shape progress, learning at a slower pace also makes it possible to commence the next steps in learning when the foundations have securely been laid.

The main task of primary education is to teach children to read and write. In this field the main problem is still the relatively high number of functional illiterates at the end of primary education; it is only slowly decreasing. Revised curricula from 2008 are therefore going back to basics to counter the lack of success at school. Thus, the main curricular topics in this field are mother tongue education (10 h per week in the first cycle, 8 h in the second cycle); mathematical literacy has however only 5 h in both cycles. Elements of fundamental learning are put together in a new discipline “discovering the world – civic education” which comprises also sport, foreign language, and art/music. This covers 9 h per week, with one-third allocated to sport and one-sixth to the foreign language. There are therefore 4.5 h per week for the remaining subjects. The consolidation cycles focus increasingly on subject-based lessons to prepare pupils for the lower level of secondary education. However, subjects such as art and history/geography/citizenship and moral education are combined in the concept of humanistic education, expressing an openness of aesthetic-social lessons for variety in political and cultural affairs. It is striking that technological elements are integrated in natural science lessons and that foreign language instruction begins early (from Year 1 as a language of interaction) due to the Europeanization of the school. In the course of the primary school, language instruction is not only about developing an awareness for foreign languages, by the end of the primary school, pupils should attain level A1 of the European Council’s framework for foreign languages (which should be the general basis of lessons).

The curricula name seven skill areas – the common pillars, *socle commun*, of modern general education as prescribed in the Education Act of 2005 – and provide

reference points on the respective skill levels that should be achieved at the end of the primary school. In other words, efforts are being made to provide an operational formulation for these education standards. Compulsory subjects include:

1. Mastering the French language
2. Practicing a modern foreign language
3. Key elements of mathematics, natural sciences, and technology
4. Mastering standard IT and communication techniques
5. Humanities
6. Social skills and citizenship
7. Personal autonomy and initiative

However, it is also clear that efforts undertaken to provide an operational definition of these educational standards in the latter mentioned skills will find their limits.

17.3.4 Lower Secondary Education (ISCED 2A)

The four *collège* classes are divided into three cycles. Year 6, the *collège* entrance school year was structured in an “adaptation cycle” in order to smooth the transition between primary and secondary education (subject lessons, specialist teachers). At the beginning of this cycle, an assessment of what has so far been learnt is carried out. The following 2 years (Years 7 and 8) have no special function, being simply labeled the “central cycle,” Year 9, the last class of the *collège*, serves as an “orientation cycle” in which almost all students made decisions about their future educational plans. It also prepares pupils for the *diplôme national du brevet* examination.

The introduction of a common lower level of secondary education with no differentiation was beset with problems from the very beginning. Educational proponents (including Legrand 1983) had proposed a system of differentiation based on pupil achievement and interests in line with the British comprehensive school and the German *Gesamtschule*. When the common secondary education was introduced in 1975, no differentiation at all was foreseen for the first 2 years (Years 6 and 7); the only possibility of differentiation was a contingent of 3 h of additional teaching for underachievers in French and in Mathematics.

However, in the *collège*, there was from beginning a hidden form of differentiation in the choice of the first foreign language. In principle, pupils can freely choose between English, Spanish, and German as a first foreign language. However, German is considered to be difficult for beginners to learn, having a complex morphology (like Latin). Therefore, German as a first language is chosen mainly by performance-oriented parents of the upper middle class. As the school classes are very often constituted according to the foreign language chosen, the children of socially advantaged families with a high school performance often come together in these classes. Thus, the choice of the first foreign language becomes a hidden

mechanism of social selection in which German takes over the function formerly assumed by Latin. In the 1990s, the school administration tried, with varying degrees of success, to put an end to this unintentional social differentiation by not permitting class composition based on German but only by bringing pupils together from different classes for first foreign language instruction.

Until the 1990s in Year 8 there was practically an external differentiation based on tracks of secondary education. Weaker pupils had the opportunity to get out of the normal tracks of the common secondary education system and to begin special classes preparing for vocational education which was already a part of the system of vocational and technical education. As these structures evidently seemed to contradict the spirit of the common lower level of secondary education, they were gradually dismantled from the beginning of the 1980s. Instead of having a system of structural differentiation based on separate classes outside of the *collège*, a curricular form of differentiation was created preferably within the general education schools: a curriculum with more practical subjects for weaker pupils in order to enable them to finish lower secondary education with a certificate (*brevet des collèges*). As mentioned above, since the 1980s it was the main aim of French educational policy to raise the participation rate in the final year of upper secondary education to 80 % of an age cohort. The educational policy closely appeared to be relatively successful, with its quantitative target of increasing the number of full lower secondary diplomas. In addition, the introduction of the *bac pro*, a vocational type of *baccalauréat*, helped tap reserves of talent and achieve the ambitious target.

However, this did not resolve the basic problem of insufficient differentiation, primarily in Years 6 and 7. In particular, transition problems between primary school and the lower level of secondary education still did not have a convincing solution. This became more urgent as a result of the growing differences between the performance of pupils leaving the primary school – most of all in the suburbs of conurbations – that presented teachers with evermore difficult tasks which could only partially be resolved by the introduction of priority education areas (*zones d'éducation prioritaires – ZEP*), i.e., the mobilization of additional funds for staff and infrastructure in socially disadvantaged areas (cf. Hörner 1995). The basic idea of the programme continues today under a different name. Thus, since the mid-1990s attempts have been made to better deal with the problem by reforming the internal structure of the *collège*.

It also shows that the logic of the reform activities from the end of the 1970s through to today has only changed a little. The first step is a personalized curriculum following a diagnosis of deficits arising from the assessment of what has been learnt conducted by the beginning of the *collège*. If these deficits cannot be remedied by targeted support in the course of the programme, there is also the possibility of easing a transition to vocational education in Year 9 through intensive contact to the professional and working world. Since 2008, this can be in the form of several levels: optional courses of 3 h per week, “Discover the World of Work,” or more compact modules of 6 h per week on the same topic for weaker pupils. These modules are mostly carried out in vocational schools and aim to prepare pupils for a vocational education. As early as Year 8, weaker pupils can choose

alternative learning modules (in connection with the vocational school sector and/or companies). Finally, there are “sections of adapted general and vocational lessons” (*sections d’enseignement général et professionnel adapté*) with a somewhat simplified curriculum which today are attended by about 3 % of pupils in the lower level of secondary education. A work placement/internship is mandatory for all Year 9 pupils.

One of the curious features of the organization of the *collège* is that compulsory schooling lasts 10 years although primary school and lower secondary school together normally last only 9 years. Implicitly, school administration assumes that those pupils who do not continue their education in upper secondary education (rather a minority) repeat a class at least once during their compulsory school career.

Subjects taught at the *collège* continue on from those in the final year of the primary school. From Year 8 other subjects are added including another foreign language; differentiated natural sciences such as biology/geology, physics/chemistry, and technology; and electives such as Latin and/or Greek or a third foreign language which may include a regional language (such as Alsatian, Breton, or even Tahitian). Besides the subjects, pupils also have 2 h per week as support lessons in Year 6 and 10 h per year for reflection on “class life” with the class tutor. Compulsory schooling ends with a central examination – the *diplôme national du brevet*.

17.3.5 Special-Needs Schools

For physically and mentally handicapped children and children with special learning problems and special educational needs, there are various possibilities: they may be integrated in “normal” classes, they may constitute special classes or even sections in “normal” schools, but they may also be concentrated in their own “special school” system (*enseignement spécialisé*). In the mid-1990s, 1.3 % of all children on the primary level frequented a special education school (roughly 56,000 pupils of the 4.23 million children of primary school age). A certain number of these schools work under the auspices of the Ministry of Health.

Among the special education sections integrated in the *collège*, there are the “sections for adapted general and vocational learning” (*sections d’enseignement général et professionnel adapté – SEGPA*) that arose from the earlier special education sections (*section d’éducation spécialisée – SES*). The main objective of this adapted learning is to make the children able to master simple handicraft jobs. Most of these children come from special sections in primary education.

17.3.6 Upper Secondary School (ISCED 3)

The main structural characteristic of the of upper secondary academic tracks (*lycée d’enseignement général et technologique*) is an increasing profiling into general

academic and technical academic education ending in a general or technical baccalaureate which gives pupil, independently of the profile, the right to enter universities without any restrictions and to participate in the selection procedures of other forms of higher education.

Already prior to 1975 there were also profiled tracks. Until this reform (which established the *collège* and reduced the *lycée* to Year 10–12), the social prestige of upper secondary profiles has been dependent on the weight of mathematics taught there. To abolish the “imperialism of mathematics” as a means of stratifying general upper secondary education, the number of profiles was reduced to three in the academic track:

- L (*littéraire*), languages and literature
- ES (*économique et social*), economic and social sciences
- S (*scientifique*), mathematics and natural sciences

Today, the technical tracks offer the following options:

- STI (*sciences et technologies industrielles*), sciences and technologies in the industrial sector
- STL (*sciences et technologies de laboratoire*), laboratory sciences and technologies
- STSS (*sciences et technologies de la santé et du social*), sciences and technologies in the health and social services sectors
- STG (*sciences et technologies de la gestion*), sciences and technologies in management
- TMD (*techniques de la musique et de la danse*), music and dance
- Hôtellerie, hotel industry
- STAV (*sciences et technologies de l'agronomie et du vivant*), agricultural sciences and technologies

As can be seen from the list, the French education system uses a broad concept of technology, a concept which is able to include management (commerce and administration) and art. In the last mentioned “tertiary” section, the overwhelming majority of the students are girls, which has the result that in sum, female students constitute the majority (in 2007 it was 66 %) of all technological profiles.

In order to avoid the problems of early specialization, a reform of upper secondary education in 1992 aimed at keeping open as long as possible the choice of the baccalaureate track. Therefore, Year 10 is still without any profile (*seconde de détermination*): there is no separation between general and technical tracks. The choice of two mandatory subjects and an elective only serves as a tentative probe for the future school career. At the end of Year 10, there is another orientation procedure. Students have to choose the general or technical baccalaureate track with their specialist profiles, or if pupils miss achievement targets in Year 10, they are “reoriented” to vocational schools or apprenticeships.

Parallel to reducing the number of baccalaureate tracks, the choice of electives has also been expanded and made more flexible. Besides the mandatory subjects that make up a profile and a core canon obligatory for all in general education, pupils can choose additional electives. This system of options smoothens the somewhat rigid nature of the tracks within upper secondary education. It is no coincidence that even today this system of options is subject to educational controversy and proposals.

In addition to the academic and technical baccalaureate tracks, since the mid-1980s pupils also have another track that is assigned to the academic track – the *baccalauréat professionnel* (see below). This has been subject to constant growth since it was introduced. In 2012, of 100 French pupils graduating from upper secondary school, 48 followed the academic track, 20 the technical track, and 32 the professional track. In the light of these figures, it is clear that the *baccalauréat* has become the key to social positioning in France today, and the ambitious target of having 80 % of an age cohort in Year 12 does not sound as fanciful as it might have done initially. Half of all graduates from upper secondary school have in fact a double qualification – in addition to a university entrance qualification, they also have a vocational training at technician level.

17.3.7 Vocational Education

Besides the technical track for a baccalaureate, the French education system has two other forms of VET (cf. Hörner 1994): vocational upper secondary education in vocational colleges (*lycées professionnels*) and a 2-year apprenticeship in a firm that either leads to a CAP (*certificat d'aptitude professionnelle*) diploma for very specific professions or to a BEP (*brevet d'études professionnelles*) for broader career options. Earlier CAP diplomas that could be attained after 3 years without completing secondary education are no longer statistically significant. An alternative vocational qualification is a kind of sandwich course (*formation en alternance*) with practical experience gained in a company combined with theoretical instruction in an apprentice's college (*centre de formation d'apprentis*). In 2007, only 28 % of all VET participants on this level were apprentices, not quite 10 % of the corresponding age group makes an apprenticeship at this level. In 2011 the quota of apprentices of the corresponding age group was not more than 5.3 %.

From 1985 to 2009, with a qualified worker/employee diploma, young people could continue their vocational education for 2 years to prepare for a *baccalauréat professionnel*. This diploma confers all prerogatives of the general or technical *baccalauréat* of the *bacheliers* gaining degrees. The numbers of students achieving the *baccalauréat professionnel* initially grew quickly but has since stagnated and accounts for about 11 % of an age cohort.

In order to provide these vocational programmes with greater momentum, the Ministry of Education introduced a 3-year programme from 2009 to 2010 that leads to the *bac pro* qualification directly after the compulsory schooling (Year 9). By reducing the 2 + 2 programme to 3 years, young people no longer need to

complete their BEP first. The BEP diploma can still be taken but has become more of an interim examination for the more practical part of the qualification. The *bac pro* has thus lost its original character – a further education diploma that requires a prior vocational qualification – and is now becoming equivalent to the two other baccalaureate tracks and can be attained in the same period of time.

Another vocational programme that goes beyond the baccalaureate and is unique to France is the post-baccalaureate higher technician track (*Sections de Techniciens Supérieurs*) which has been integrated in some larger technical *lycées* and can lead to the *brevet de technicien supérieur* (BTS). Education politicians are of the opinion that this diploma should have been replaced some time ago by the *diplôme universitaire de technologie* (DUT) that can be attained at technical universities *Instituts Universitaires de Technologie*. The social demand alone, especially from students themselves, saved it from this fate. In 2012, twice as many BTSs were awarded as DUTs. The initiators of the new programme leading to the *bac pro* also believe that the BTS could well be a possible and realistic subsequent qualification for high-achieving graduates of the *bac pro*. However, they do issue a reminder that the actual mission of students achieving the *baccalauréat professionnel* is to secure speedy entry into professional life.

17.3.8 Tertiary Education (ISCED 5A/5B/6)

The organization of postsecondary education has particular forms in France. Besides the universities that are open for all holders of a *baccalauréat*, whatever the type might be – there are no tuition fees and no entrance selection, but the selection becomes relevant in the course of the study – there are the elite universities, the *Grandes Ecoles*, and the IUTs (*Instituts Universitaires de Technologie*), polytechnic-type facilities that require entrance examinations. Formally at the same level as the IUTs are the STSs (*Sections de Techniciens Supérieurs*). Because these are affiliated to schools, they do count as non-tertiary, postsecondary educational facilities.

The *Grandes Ecoles* usually specialize in certain disciplines (such as engineering, business, or administration and also as reference disciplines related to teacher training in *Ecoles Normales Supérieures*) and are highly selective, i.e., entry is only by means of competition (*concours*) which requires an extremely intensive 2-year preparatory course offered in some well-known *lycées*. As the number of candidates prepared in this way far exceeds the number of places available at the *Grandes Ecoles*, the period of time spent by unsuccessful candidates in preparing for courses is offset against future study. Successful candidates can expect preferential terms of study, generous funding, and a social network that guarantees attractive employment possibilities once they graduate.

IUTs have more than doubled their student intake since 1980 (110,000 students in 2012/2013). They have become more appealing following the implementation of the Bologna process. Since 2000, these institutions also offer a 3-year *licence professionnelle* programme that is equivalent to a bachelor's degree in addition to

their 2-year short programmes that lead to the *diplôme universitaire de technologie* (DUT). This certificate was specifically introduced with the Bologna process to make the previous 2-year course compatible with the rest of Europe. Since this option was introduced in 2000, the number of students studying this at IUTs has increased tenfold (from 2,100 to more than 24,000 in 2007 to 2008). The logic of the Bologna process, which practically levels out the structural diversification of the higher education system by harmonizing the curricula, means that some institutes are beginning to offer master's programmes that follow on from the 3-year undergraduate programme.

By implementing the Bologna process, the French education system and its Education Act of 2005 has set itself the goal of having half of an age cohort graduating from university.

At first glance, France had hardly any problem to implement the Bologna process. The previous *licence* (3 years' study) was aligned to the European bachelor programme (it did however retain its old name), the *maîtrise* (4 years' study) was replaced by master's programmes (5 years' study), and after further 3 years (i.e., a total of 8 years' study), students can take their doctorate examinations. The difficulties lay in the detailed organization and affected such aspects as the duration of the cycles. The first cycle of university study had previously lasted 2 years after which students were awarded a diploma and transferred to a new year of study. The selection, i.e., the transfer to research, took place after the *Maîtrise* (4 years' study). Today's *licence* is on the one hand the first "proper" university degree and according to the Bologna logic it is also the first selection threshold.

This requires some rethinking for some French educationalists still influenced by the old train of thought. With the exception of the 2-year training programmes DUT and BTS, all higher education courses have been allocated to the European Credit Transfer System (ECTS).

The ongoing organizational and structural reform of higher education instigated as a result of the Law Relating to the Freedoms and Responsibilities of Universities has provoked controversial discussion. The proclaimed aim of the law is to strengthen the autonomy and accountability of universities and to transfer full financial autonomy to them by 2013. As part of this, university committees are to be reconstituted, strengthening external members. Students suspect that this is a backdoor approach to introduce tuition fees, and many lecturers see this ostensible independence as the state's retreat from its responsibility for research and are afraid of the growing dependence on private business.

17.3.9 Adult Education

Lifelong learning is a key factor in the French education system. It is a legacy of a humanistic tradition attributable to Condorcet. It was developed in the nineteenth and twentieth century to promote professional and social mobility. The first evening lessons for adults were introduced in 1833 to continue the work of the school. The impetus for the present-day regulations governing professional training and

development was provided by the Grenelle agreement in the wake of the May 1968 demonstrations. This in turn resulted in the Vocational Education Act of 1971 which saw ongoing professional training – comprising both initial training and continued development – as a national obligation. In 1978, the Law on Individual Educational Leave (*CIF – Congé Individuel de Formation*) was passed that allowed employees to pursue personal training and development without fear of dismissal or pay cuts. Special facilities were created to coordinate continued education programmes such as *GRETA (Groupement d'établissements publics d'enseignement* – the merger of public educational facilities – from *collège* to university). Their tasks have increased over the years. They evaluate the skills of candidates, help them find direction in their professional lives, and compile training programmes, from CAP to BTS. As a consequence, an increasing number of laws and decrees have been passed that promote the development of continued education. However, the economic context of 1971 (intensive growth and full employment) has changed quickly. Professional training has also changed: from a factor determining professional mobility, it has become a key factor in the integration and insertion of people having to adapt to changing circumstances or of people without any qualifications. In the 1980s measures were introduced to retrain employees who had lost their job. In the 1990s professional experience was recognized as a formal qualification, making it easier for people to return to work. The *GRETA* are now also responsible for reintroducing the unemployed into working processes, acquiring new qualifications, adapting new technologies, and formally recognizing professional experience.

17.4 Developments in the Current School System

17.4.1 Transition Between School Forms and Integration in the World of Work

In the field of general education, the French education system only recognizes two qualifications that mark the transition to the next level of schooling: the *diplôme national du brevet* that concludes the lower level of secondary education and the various types of *baccalauréat*.

The *brevet* is a national examination. It includes school achievements from Year 9 and centrally organized external examinations in core subjects. Since the Education Act of 2005 and the introduction of the “common pillar” of basic skills, the *brevet* is also used to assess whether these minimum standards have been attained. Since this reform, the certificate also contains a mark for behavior, a disciplinary function aimed at combating violence in schools. Finally, the final mark on the certificate also includes the result of work experience to give weaker pupils an increased chance of acquiring the diploma. The *brevet* also provides motivation to achieve with special awards that form the basis for scholarships. However, it should be noted that the diploma itself does not provide automatic acceptance to Year 10. The division into different options at the upper level of secondary education is

carried out in a dedicated orientation procedure at the end of Year 9 with the subject teachers playing a key role.

The *baccalauréat* is a major instrument in determining a person's social position in France. Access to the whole tertiary level of education is tied to passing the *baccalauréat*. Historically – at university in the middle ages, a *baccalaureus* was someone who has passed the trivium (grammar, rhetoric, and dialectics) in preparation for the actual study of a discipline – the French *baccalauréat* is still the first university degree, although preparation for university study in France was taken out of the hand of universities at an early stage. Today it is the responsibility of the secondary school which explains some of its particularities. As the first university degree, the examination is under the supervision of university bodies and is an external examination prepared centrally at national level.

The quantitative democratization of the school was accompanied by an undeniably qualitative democratization: the proportion of university students from working-class backgrounds has increased significantly, and the number of pupils in an age cohort with the *baccalauréat* has more than trebled in the last 35 years. However, the labor market has also changed and the demands on an employee have become ever bigger. The *baccalauréat*, which used to be able to secure a management position without any difficulty, has become common property and can no longer provide the guarantee of the past. The vocational diplomas CAP and BEP that prepare young people for a specific job or in a particularly industry do not enjoy social esteem nor do they pay off because they are under the level of the *baccalauréat*. They tend to lead to socially devalued jobs with little opportunity for development.

This means that selection is still in evidence even if it has become democratized and even if the mesh is not as tight as it has been. In the integrative school system, it has also taken on a number of faces: selection through choice of foreign languages or through any electives, socio-geographical bias supported by tricks to bypass divisions based on school district (which actually are intended to promote a social mix), private lessons and cramming sessions not only for examination preparation at school level but also for students of medicine and law, summer (language) schools, etc. These more or less hidden mechanisms are of course exploited by families that can financially afford it. Families from more modest backgrounds probably would not dare to do this, or do not know that these means are available, or do not see why they should resort to such means, or simply cannot afford it.

17.4.2 Dealing with Special Problems

The virtual inclusion of whole age groups in secondary education has certainly raised the average level of education of the population; it has also brought about a range of problems largely due to the inflexibility of secondary curricula that now have to take account of a new school population which previously had to go to the primary school. As described above, veiled selection leads to more affluent families being able to avoid “ghetto” schools by circumventing divisions based on school

district which non-favored families cannot do. By manipulating electives and foreign languages, schools are trying to attract the “best” pupils or stop their exodus. Other schools in socially deprived areas have been abandoned – there is simply no social mix. The economic and social situation in these areas – often working-class suburbs in conurbations – is reflected in the schools where truancy and violence are much more in evidence. Although the creation of priority areas of education mobilized additional funds to solve these problems, it also labeled schools as schools in difficulty thereby condemning these areas as areas to be avoided by parents and teachers. A study published in 2005 summarized the situation as “school-based apartheid” (Felouzis e. a. 2005) and all the measures of positive discrimination cannot expunge this.

To combat the failures of school and drop-out rates, which today account for roughly 7 % of pupils, special measures have been adopted and specially trained staff employed to help give pupils greater orientation and help them get back to school. These supportive measures include camps to motivate children to return to school, with support at *collège* or with a network of teachers “Helping Disinterested Children,” teachers that have been specially trained to work in deprived areas, in an effort to work in small groups of children that have major problems with and in school.

The hard line taken by politicians against migrants without taking into account any pedagogical issues was illustrated among other things by the deportation in 2008 of foreign families together with their children – children who had gone to school in France and some of whom were actually born in France. The network “Education Without Frontiers” demonstrated against this deportation which was supported by numerous parents, teachers, and head teachers to try to stop the deportation of children attending school in France.

17.5 New Developments

The heated debate on the binding nature of school districts and on determining school facilities has not cooled following a decision of the Sarkozy government to moderate requirements to send children to a school in their residential district. Several studies have shown that, as a result, the social diversity has receded considerably and that only socially privileged families – either through their standard of education or their financial resources – stand to gain from the easing of this obligation. The new socialist government under Hollande is intending to anchor mandatory school districts in law. However, nothing as yet has been undertaken in this direction, not least because the issue is laden with conflict.

Changes are to be expected in teacher training and staffing after 2013. In the Sarkozy era, the IUFMs were practically abolished. In its place, the recruiting competition for new teachers in the master degree phase was postponed, and the previously paid probationary period was cleared away and replaced by a series of (partially) unpaid work placements. From 2013 to 2014, new *Ecoles Supérieures du Professorat et de l'Éducation* are to be established. These new universities of

teacher training are to focus on a common core of pedagogic study and aim to generate a common professional culture for all professional aspects of the education system. The link to universities is to be stronger than was the case with the IUFMs. By this mean the transfer between theory and practice should be more effectively shaped and the exchange of research and teaching staff better promoted.

Teacher training is to be redeveloped, and in the second year of the master's phase, students will be paid as civil servants (albeit only on half a salary). The practical element will again increase (to one-third of the regular training period) and the funding of the course eased by payments made in this second year. The hope here is that this will attract candidates from all social corners of the population to the teaching profession.

Through this new approach to teacher training, the government is also looking to increase the numbers of teachers with plans in preparation to appoint 60,000 teachers between 2012 and 2017. The originally planned loss of every second civil service job has been rethought. In areas where the social diversity is strong, the new aim is expressed by the slogan "More Teachers than Classes."

The public discussion on the daily and weekly schedules at primary school has picked up in the last few years. Among others, development psychologists have warned about the pressure of work faced by pupils, and also the tourist industry and public transport administrators have become involved. In 2008, the decision was taken that primary school children should attend school 4 days per week (weekdays except for Wednesday). This meant that French children would have the fewest number of school days of all OECD countries (144 days compared to an OECD average of 187 days). From September 2013, primary school pupils will attend school for nine half days per week. Giving class on Wednesday morning means that the other school days can finish 45 min earlier.

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Natia Andguladze and Iva Mindadze

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18.1 History and Social Parameters of the Education System

18.1.1 Historical Development

Located between western Asia and eastern Europe, Georgia shares its borders with Russia to the north; Armenia, Azerbaijan, and Turkey to the south; and the Black

N. Andguladze (✉)

Research Division, MoES, Georgia

I. Mindadze

Germanist, stellvertretender Direktor des Nationalen Prüfungszentrums und Abteilungsleiter DaF des Instituts für Pädagogik an der Staatlichen Universität Tbilissi, Tbilisi, Georgia

Sea to the west. Its de jure territory is 69,700 m². The country's population was approximately 4.5 million as of 2011, with over a million living in the capital city Tbilisi. Eighty-four percent of the population is ethnic Georgian. Other major ethnic groups are Abkhazians, Ossetians, Armenians, Azerbaijanis, Russians, Kurds, and Greeks. Over 300,000 citizens are displaced from Abkhazia and South Ossetia.

Georgia

		Grade	Age
		17	23
		16	22
University College		15	21
		14	20
Community College		13	19
		12	18
Secondary School		11	17
		10	16
TEI, VET Center, Vocational School		9	15
		8	14
Basic School		7	13
		6	12
Primary School		5	11
		4	10
Kindergarten (Pre-school)		3	9
		2	8
		1	7
		6	6
		5	5
		4	4
		3	3

Compulsory education

Soviet rule shaped the recent history of the country. After gaining independence from the tsarist Russia's 200-year occupation in 1918, Georgia existed as the Democratic Republic of Georgia for 3 years. Soviet annexation in 1921 was followed by the nationalization of private property, wholesale executions and deportations of hundreds of thousands of farmers and intelligentsia, and isolation from the rest of the world. After 30 years of terror, the central power began to gradually weaken, resulting in the rampant spread of corruption in virtually all areas of social and economic life but also the revitalization of cultural life. Georgia enjoyed one of the highest standards of living in the Soviet Union. The decade after independence from the Soviet Union was marked by a civil war and a severe economic crisis. Decoupling from the Soviet economic system and rapid transition to market economy left the country in a state of economic collapse. The country's GDP decreased by 75 %.

During the last few years, the government made series of decisive changes toward eliminating corruption, promoting privatization and deregulation, and reforming public agencies, taxation, and social services. Budget revenues and foreign direct investment increased at twice the average for CIS countries. Tackling low- and middle-level corruption has perhaps been the country's most impressive achievement. In the 2009 Global Corruption Report, Georgia scored 3.9, one of the best scores for the countries of the former Soviet Union and a significant improvement from the score of 1.8 prior to the reform. Despite its ongoing development, Georgia is still a poor country. The country's GDP per capita is one of the lowest in the region at \$4,774 in 2009. Poverty and unemployment remain the country's biggest challenges. In 2010 national survey, 25 % of respondents said their household did not have enough money for food, and 42 % said they could afford food but not clothes. Poverty headcount ratio at national poverty level reached 25 % in 2009 (World Bank). Rural poverty is a particular challenge for the country. The lack of employment or income-earning opportunities has been consistently highlighted as the number one concern in Georgia, as repeatedly demonstrated by independent public opinion polls over the past years. In the latest poll from 2011, 35 % of survey participants stated they were unemployed and looking for a job (Caucasus Research Resource Center). According to the official data, 15 % of the population is unemployed (National Statistics Office).

18.1.2 Important Reform and Innovation Stages

The educational system in Georgia emerged from the Soviet rule with a centrally planned curriculum and tightly controlled educational processes, but also universal free access to education, with illiteracy negligible and good standards of entry in tertiary education. Following independence, the development of the educational system in Georgia can be divided into three main phases.

The first phase, the period from the early years of independence through 2003, was characterized by an unprecedented decrease in education spending (the state

budget for education in 1996 was only 5 % of what it had been in 1989), the emergence of private educational institutions often of questionable quality, introduction of cost sharing, and spreading of corruption throughout the system (The World Bank, Report No. 20952). All of these factors resulted in the overall deterioration of educational quality. Changing socioeconomic structure of the population caused concern over access to education for disadvantaged groups. In 1997, the Ministry of Education developed an ambitious program. The program had a strong focus on improving the quality and efficiency of primary and general secondary education, strengthening institutional capacity, and mobilizing public and private resources. Through this, the government aimed to address the (1) misalignment of primary and secondary educational system objectives and the quality and relevance of student learning outcomes; (2) inefficiencies in the use of financial, physical, and human resources; (3) growing inequities; and (4) weak governance and management capacity. In 2001, after nearly 2 years of preparation, the Education System Realignment and Strengthening Programme was introduced, funded by a World Bank loan of \$45 million to be allocated in 12 years and three phases. The key areas of intervention were professional development of teachers, educational standards, and a national assessment infrastructure.

In 2004, the second phase of major education reform began under the new government. The Ministry of Education and Science (MES) of Georgia implemented the following changes:

- Schools and tertiary educational institutions (TEI) were transformed into autonomous legal entities of public law governed by elected representative bodies. These entities were vested with the power of selecting and removing school headteachers and university rectors and approving and monitoring the institution's budget.
- A new financing model under the principle of “money follows pupil” was introduced both at schools and TEI with per capita financing in schools and pupil and research grants in TEI. This change has brought greater transparency into the education financing system.
- Unified entrance examinations for TEI were introduced across a range of subjects, administered by the newly established National Assessment and Examinations Centre (NAEC).
- A new national curriculum was introduced by the National Curriculum and Assessment Centre, together with special and corrective programs for pupils with disabilities and those in need of long-term treatment.
- The teacher professional development by the Teacher's Professional Development Centre and certification system was developed by the Teacher's Professional Development Centre and the National Examination Centre.

The third phase (2010 through 2012) was the phase of recentralization of the sector and putting greater focus on controlling for inputs, educational processes, and operations at educational institutions. This trend toward recentralization was demonstrated by (1) school Boards of Trustees (BoTs) losing their leading role in

school decision-making and the MES assuming power to appoint school headteachers, (2) centralization of textbook development and teacher professional development infrastructure, (3) starting secondary school leaving exams in nine subject areas, and (4) introducing school police (*mandaturi*) into the school system to control the implementation of MES bylaws at individual school level by reporting violations of rules to the head of the *mandaturi* office at the MES. Similar governance changes occurred at the tertiary level.

18.2 Fundamentals, Organization, and Governance of the Education System

18.2.1 Governance

The educational system is regulated by the parliament, the government, and the MES. The parliament of Georgia is responsible for developing national policy and the main directions of the sector. The government of Georgia defines national objectives, per capita funding standards, and the amount of vouchers. The MES develops indicators, designates educational institutions as legal entities of either public or private law and has the authority to reorganize or liquidate them (in the autonomous republics of Adjara and Abkhazia, some of these powers are delegated to the Ministries of Education of the autonomous republics), and is responsible for state control of public educational institutions.

The educational system in Georgia has multiple accountability mechanisms in place. These mechanisms control inputs, processes, and, to a certain degree, outputs in all subsectors and apply to both public and private institutions. They are administered by the MES agencies: (1) the National Examination Center conducts school leaving exams, unified admission tests to tertiary and vocational programs, and teacher certification exams; (2) the MES develops the national curriculum for the general schools and approves the textbooks to be used in general educational institutions; (3) the Teacher's Professional Development Centre develops standards for teachers, implements teachers' professional development services, and grants the right to be a teacher; and (4) the National Centre for Educational Quality Enhancement is responsible for authorization and accreditation of both private and public institutions at all levels of education.

Secondary educational institutions are run directly by the MES. The original decentralization legislation established school-level BoTs with powers to appoint and dismiss school headteachers, formulate school budgets, and monitor school expenditures. As a result of the legislative changes made in 2010 and 2011, these powers have diminished considerably. Schools are now controlled by the MES with, as mentioned above, the power to terminate BoTs and to appoint and terminate school headteachers and also to introduce school police.

Secondary vocational educational institutions are run by centers' directors appointed by the MES. Public professional centers have supervisory boards represented by one local government member, one nongovernmental organization

Table 18.1 Education expenditures

Year	Public funding for education as % of GDP	Public funding for education as % of total government spending	Government expenditure as a share of GDP	GDP per capita
	(1)	(2)	(3)	(4)
2000	2.2	11.7	11.6	689.7
2001	2.1	11.5	10.8	731.8
2002	2.2	11.8	11.3	777.3
2003	2.1	11.6	10.7	919.0
2004	2.9	13.1	14.6	1,187.6
2005	2.5	8.8	17.3	1,483.5
2006	2.8	9.9	27.9	1,763.5
2007	2.6	7.9	33.0	2,314.6
2008	2.5	6.5	39.0	2,921.1
2009	3.2	7.9	40.4	2,455.2
2010	3.0	8.4	36.5	2,623.0
2011	2.6	8.3	31.7	3,215.4

Source: The figures from 2006 to 2011 in columns 1, 2, and 3 are the review team estimates based on the Ministry of Finance budget reports for 2008, 2009, 2010, and 2011 and National Statistics Office figures on the gross domestic product; data on years before 2006 are drawn from the World Bank Statistics Databank; Column 4: National Statistics Office

employee appointed by the MES, a parent elected by parents, and a teacher. The supervisory board is responsible for approving budget report, the center's bylaws, and the center's personnel plan (after the latter is approved by the MES) and monitoring the center's finances. There were several attempts to increase social partners' participation in the sector governance and management. However, soon after establishing the National Professional Education Council, the government took back the powers previously delegated to the council.

All public tertiary educational institutions are legal entities of public law and are run by rectors elected by the academic council representing the university academic staff and the student body. All public universities are supervised by Boards of Regents which are composed of the government officials.

18.2.2 Financing

18.2.2.1 Public and Private Funding

During the last decade, public expenditure increased together with the country's economy. Public spending on education, however, remains low in Georgia. The share of education expenditure in the total government expenditure decreased by 3.5 % from 2000 to 2011 and has been kept below 10 % during the last 7 years (see Table 18.1). In a comparative perspective, Georgia's spending on education is below the world average and the lower middle-income country average. Adding total government spending to the picture is perhaps more telling: countries with the

same level of total government spending spend on average 1.9 % more of their GDP on education than Georgia does.¹

Low public investment in education is partially being compensated by high private expenditure on education. Almost 30 % of education funding and 0.8 % percent of the country's GDP come from households, exceeding the private share for most European countries (Geostat National Household Survey; Eurostat).

18.2.2.2 Allocation

The education funding scheme was changed in line with the reforms launched in 2004 through introduction of per capita funding at the general education level and student grants at the tertiary level. Voucher funding allocated an equal amount of money to students in public and private institutions, and the size of the voucher varied according to estimated population density. But this arrangement resulted in an extremely unequal distribution of public resources, due to a very large share of small schools in rural and remote areas. These small rural schools were placed at a disadvantage compared to large schools mainly in urban areas favored through economy of scale. The new funding formula introduced in 2010 is based on enrolment per year for each school, curriculum requirements, teacher hours, teacher salary schedule pay rates, and historical average shares of nonteaching staff salaries, utility costs, and other costs. The MES has also introduced school foundation grants into the funding system as part of the new formula funding. Each school with less than 600 pupils receives additional base funding that varies according to school size. Additional weight is assigned to schools or sectors with minority language instruction.

For secondary level vocational education and training, the government issues the priority list for funding for professional education levels 1–3. The Vocational Education and Training (VET) Centres conduct the entrance examination. If a student achieves high scores and goes into a priority field, the MES covers 80 % of expenses, and 20 % is covered by the student. If a student does not attain a high score or goes into a non-priority field, she or he pays the full tuition fee. In addition, secondary VET receives lump sum funding from the MES. The amount is negotiated between the director of VET and MES. According to the 2011 MES data, during the last academic year, 63.4 % of public VET students received state funding.

HEIs in Georgia are primarily funded through tuition fees from households. State funding is allocated through student merit (and very little need-based) grants and research grants. A few small public universities also receive lump sum grants. Taking the university system as a whole, cost sharing is pervasive; for TEIs in the public sector, tuition fees account for 75 % of total income; only about a fifth is offset by state-funded merit and need-based grants. In 2009, the state funded only 35 % of the costs of the university system in Georgia, directly or indirectly, about half of the average OECD public expenditure (67 % in 2008) on tertiary educational institutions.

¹Calculations are based on the World Bank World Databank, government expenses as a share of GDP and public spending on education as % of GDP. Reference year is 2007.

Table 18.2 Enrolment by education levels in public and private educational institutions, 2012/2013 academic year

Education level	Educational institutions			Students		
	Public	Private	Total	Public	Private	Total
Primary, basic, and secondary	2,084	236	2,320	506,659	52,756	559,415
Vocational	86	n.a.	n.a.	12,326	n.a.	n.a.
Tertiary	19	38	57	80,009	29,524	109,533

Source: Georgian Statistics Office

At public TEI, tuition fees have increased over time and are now equivalent to 48 % of GDP per capita. At some private TEIs, tuition fees reach 200 % of GDP per capita.

18.3 Overview of the Structure of the Education System

The educational system in Georgia is comprised of preschool, general, professional, and higher education.

18.3.1 Preschool

Participation in preschool education is not compulsory. Typical age for preschool education is from 3 to 6. Approximately 44 % of the age cohort is enrolled in preschool institutions. Participation in preschool education is lower in rural areas.

18.3.2 General Education

There are 2,320 schools in Georgia, with 506,659 pupils in public schools and 52,756 in 236 private schools (Table 18.2). General education is offered in three levels: primary education, basic education, and secondary education. The 6-year primary school is the first part of the 9-year compulsory education. Pupils normally start at the age of 6. There is a basic curriculum for each of the six primary years. Pupils are taught Georgian language and literature, mathematics, history, natural sciences, arts, ICT, civic security, and sports. The first foreign language must be introduced no later than Year 3. Transition to the next year is automatic given regular attendance and a positive evaluation from the teacher. The 3-year-long basic school (Year 7–9, 12–14+ years old) is the second stage of compulsory schooling. The school program includes Georgian language, mathematics, history, geography, civic education, physics, chemistry, biology, arts, ICT, civic security, and sports. The second foreign language is introduced in Year 7. Once compulsory basic education is completed, students can either continue into secondary education; enter into first, second, or third levels of professional education; or leave the educational system

altogether. Secondary education covers Years 10 through 12. Typically students enter at the age of 15. Attending secondary school is voluntary. At the completion of secondary education, students take national school leaving exams.

18.3.3 Vocational Education and Training

Recent legislative changes have introduced a new qualification framework into the secondary and postsecondary vocational education and training system. Professional degrees are divided into five levels. Levels 1 and 2 are offered by community colleges and VET centers. Levels 3, 4, and 5 are offered at the tertiary level by community colleges as well as TEI. Twenty state and 75 private vocational educational institutions as well as 17 state and 5 private TEI offer vocational education programs.

18.3.4 Tertiary Education

The 2005 Higher Education Act introduced three levels of higher education (baccalaureate [BA], 240 ECTS credits; Master's [MA], 120 credits; doctorate, 180 credits). The law differentiated between three types of higher educational institutions: (1) college, a higher educational institution that offers the first-level educational programs; (2) teaching university, a tertiary educational teaching institution that offers BA and MA, but not PhD, programs; and (3) university, a tertiary educational research institution that offers programs at all three levels. TEI offers both academic and professional programs at the undergraduate and graduate (MA and doctoral) levels. Accredited teaching or research universities in 2012/2013 academic year enrolled some 109,533 students.

18.4 New Developments

18.4.1 Low Quality and Relevance

Despite generally high enrolment and attainment rates, growing unemployment rates among youth points toward the shortage of relevant skills among the Georgian youth. Programme for International Student Assessment (PISA) shows that pupils aged 15 perform significantly below the OECD average in reading, mathematics, and science skills (Table 18.3). Moreover, Georgia has a very large share of pupils who have such poor numeracy and literacy skills that their success in modern workplace is highly doubtful. According to PISA results, 13 % of students in reading assessment, 40 % of pupils in mathematics assessment, and 32 % of students in science assessment perform at the lowest level of seven assessment levels.

The story, however, starts at earlier ages. International assessments such as the Progress in International Reading Literacy Study 2011 (PIRLS) and the Trends in

Table 18.3 PISA (2009), PIRLS (2011), and TIMSS (2011) results for Georgia

	Year	Reading	Mathematics	Sciences
PISA Georgia	2009	374	380	373
PISA OECD average		493	496	501
PIRLS Georgia	2011	488		
International scale average for PIRLS		500		
TIMSS year 4	2011		450	455
International scale average for TIMSS year 4			500	500
TIMSS year 8	2011		431	420
International scale average for TIMSS year 4			500	500

Sources: OECD (2010), Martin et al. (2012)

International Mathematics and Science Study (TIMSS) show alarming results. The country's average score in all dimensions is significantly below the international average. Georgia has a very large proportion of pupils performing below the assessment scale. For example, in the mathematics assessment, 9 % of pupils in Year 4 and 15 % of pupils in Year 8 perform below the TIMSS assessment scale.

18.4.2 Equity in Access and Learning Outcomes

Access to preschool, secondary, and tertiary levels of education remains a function of children and youth's family socioeconomic and ethnic background and their place of residence. Learning outcomes vary greatly according to the place of pupils' residence, family income, and parents' education.

At primary and basic education level, enrolment rates do not show significant differences between poor and nonpoor populations, between rural and urban schools, or between ethnic groups. Such differences begin to appear at the secondary level and become more profound at the postsecondary level. Participation in education in the age group of 15 through 17 is the lowest among ethnic minorities. Among the age group of 15 through 17, 85 % of ethnic Georgians are enrolled in schools, but only 59 % of ethnic minorities are in secondary schools. Disparities in tertiary education enrolment rates are dramatic. Among the poorest quintile, enrolment rate is 9 % while in the richest quintile enrolment rate is 38 %. Youth in the capital city have the highest enrolment rate at 42 % while rural areas have 9 % enrolment rate. Ethnicity is another important factor. Only 3 % of the relevant age Azerbaijani youth attend universities and colleges (estimates based on Geostat National Household Survey).

The increasing gaps are largely attributed to the barriers to access to preschool and postsecondary education. These barriers are mostly associated with high fees at preschool and tertiary level but also inadequate absorbing capacity of the vocational sector (geographical coverage and available places). High tuition fees and a weak state support system create barriers to access to tertiary education for poor pupils. Tuition fees for public universities as a percentage of per capita GDP are much

higher in Georgia than in all OECD countries for which data is available. On average, full-time students in public universities in Georgia in the 2012/2013 academic year paid 2,000 GEL, equivalent to 48 % of the country's GDP per capita.

As recent international assessments show, pupils from different family socio-economic backgrounds and residence differ greatly by learning outcomes. PIRLS, TIMSS, and PISA data show that pupils in rural areas, pupils with less educated parents, and pupils with less educational resources at home perform significantly below their peers from more affluent families and in urban areas. The former also have fewer educational resources at school. Moreover, during the last few years, the performance gaps between pupils have been growing: the performance of pupils with more educated parents is improving, while the performance of their peers with less educated parents remains the same or is decreasing.

18.4.3 The Dilemma of Control and Autonomy

In the period from 2004 to 2005, the Georgian government made legislative changes that gave higher autonomy to educational institutions. However, during the last few years, the education system has moved toward greater centralization, with the government assuming most decision-making powers at the expense of educational institutions' autonomy. Moreover, the government exercises excessive central control over inputs and processes deluding the attending and resources from what really matters – the academic results that educational institutions achieve.

At general education level, the original decentralization legislation (2005) established school-level BoTs with autonomous powers to appoint and dismiss school headteachers, formulate school budgets, and monitor school expenditure. A new system of school vouchers was introduced, granting parents choice and giving schools control over their own budgets. Simultaneously, regional units of the MES were redefined as Education Resource Centers with the explicit purpose of supporting and monitoring Boards of Trustees. In 2011 changes in the general education law have recentralized power, hollowing out the powers of the Boards. At VET level, the law gives management powers to the VET board of trustees, but the Ministry has to approve the personnel plan for every public VET center. At tertiary level, the initial law gave the university academic and representative boards the power to elect the university rector and the university chancellor, approve and monitor their budget, etc. But 2011 legislative changes delegate the power for appointing the chancellor and approving the university budget to a government board.

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H. Döbert (✉)
University of Erfurt, Erfurt, Germany

19.1 History and Social Parameters of the Education System

19.1.1 Cornerstones of Historical Developments

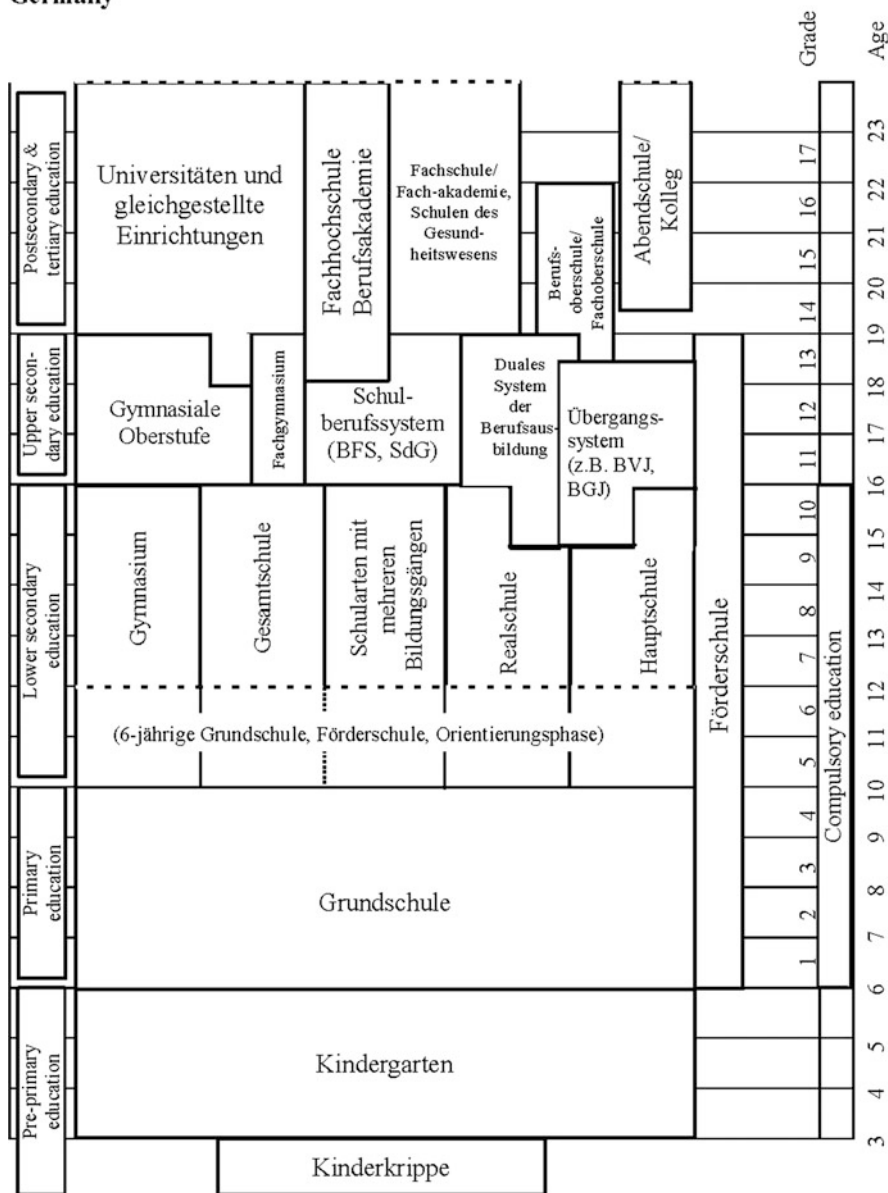
The development of school education in Germany is characterized by a long and eventful history. The most significant aspects of this history can be outlined as follows.

The beginnings of the German school system can be traced back to “monastery schools” (*Klosterschulen*), which are documented from the ninth century, and to cathedral and collegiate schools (*Dom- und Stiftsschulen*), from the twelfth century. The monastery schools are considered to be the main pillars of the written work and imparters of knowledge in the Middle Ages. The monastery schools are also considered to be the precursors of the later grammar schools (*Gymnasien*). In the Middle Ages, especially in the context of the growth in trade, the emergence of cities, and the institutionalization of handicrafts, competencies in reading, writing, and numeracy became necessary for ever-growing proportions of the population. In response to these needs, private and later communal schools were established in which elementary skills were taught. The heyday of these German schools for writing and mathematics stretched from the thirteenth to the eighteenth century, and they are regarded as one of the roots of the *Volksschule* (“people’s school”), which later became the *Hauptschule*. The emergence of the broader middle class from the eighteenth century led to the establishment of the *Realschule*. Its guiding principles were to cater for those who desired an education which went beyond that of the *Volksschule* but did not intend to pursue an academic career. The education imparted at this school differed from both classical humanistic and popular education. During the course of the nineteenth century, a three-track school system came into existence, whose role was essentially to cater to and stabilize the social interests of the three-class society of Germany. Besides the Church, “reichsfrei” (towns that had attained autonomy through direct subjugation to the emperor) or independent towns also maintained schools, which were created for their own purposes. During the whole period of the Holy Roman Empire of the German Nation (962–1806), state control for education was insignificant.

Given the dualism represented by the two major churches and the entrenchment of the territorial principalities, the school system developed independently from the sixteenth century in line with the judicial system and the religious/educational tendencies prevalent in the respective domains. However, similar patterns did emerge: the system was class oriented, confessional, and feudal based and, depending on the vocational aims, supported various profiles. Partly competitive, the school system was an arena for communal, sovereign, and religious activities and rights.

The modernization process in education that began at the turn of the nineteenth century strengthened the role of the state in the school system (Tenorth 1992, p. 136 ff.) and met the educational interests of broad strata of the population. Since the end of the eighteenth century, schools and universities have as a rule been state institutions, and they can only be established and operated with the approval of the state in the form of the governments of the *Länder* (General State Law for the Prussian States of 1794). The diversity stemming from the federal

Germany



system and from state and confessional contradictions, along with the continuing homogenizing ideal of national educational unity, characterized the history of German schools in the nineteenth century and beyond (Anweiler 1996, p. 31). In the first half of the nineteenth century, a state-organized school system emerged

in the states of the German Federation (1815–1866). This divided children by class and by religious confession. In German territories, early attempts were made to develop the school system by decree and with the means of a body of public servants that was gaining political clout.

The first independent ministries of education emerged as an element of general district administration just prior to the nineteenth century. The church supervised local internal education matters – the content of education and teaching staff – while the public authority was responsible for external matters, especially for building and maintaining schools. This distinction between internal and external matters later became a dividing line between national and municipal responsibilities in education.

Neither in the German Empire (1871–1918) nor in the Weimar Republic (1918–1933) were there any unitary regulations on schooling or higher education. Only the national Act on Primary Schools (*Reichsgrundschulgesetz*) of 1920 established, through the introduction of a 4-year primary school, a form of statutory regulation in Germany. The same applied to compulsory education: until 1918, the only duty was to provide instruction, which could also take the form of homeschooling (Tenorth 1992, p. 37). The Weimar Constitution (Article 145) was the first legal document to stipulate general compulsory school education. The National Socialist regime (1933–1945) did not introduce any all-embracing changes to the three-track school structure in Germany.

Following the breakdown of the NS regime, the *Länder* in the three western zones, later the Federal Republic of Germany, largely adopted the pre-1933 school structure and developed their school systems in the tradition of federalism. This meant that the *Länder* had legislative as well as administrative competency. In contrast, in the Soviet Occupation Zone and then the GDR, an 8-year comprehensive school (*Einheitsschule*) and a 4-year upper secondary school were introduced, which were later replaced by a 10-year general education polytechnical high school (*Polytechnische Oberschule*). Thus, from 1949, the education system of West Germany and its federal structure were diametrically opposed to the centralized structure of East Germany (Anweiler 1996, p. 32). Furthermore, from the beginning onwards, the education system of both German states displayed major differences in their organization, structure, goals, and contents, as well as in their treatment of the “results of education.” In the school structure alone, a significant difference was evident. On the one hand, there were the three classic types, born out of historical tradition, of the general education school system in the Federal Republic of Germany: the *Volksschule* (after 1964 the *Hauptschule*), the *Realschule*, and grammar school or *Gymnasium* (to which must be added, from the beginning of the 1960s, comprehensive schools). On the other hand, the GDR had the 10-year general education high school for all pupils.

Since the first years of the Federal Republic of Germany, educational reforms aimed at changing this three-track structure hardly made any progress. However, parliamentary democracy and pluralistic public life as a whole have turned out to be a decisive gain for the education system (Geißler 2013, p. 715). In contrast, educational reform in the GDR lacked any real perspective, in spite of many radical

measures and a program focused on equality of educational opportunity up to higher education, not least because reform-oriented and educational discussions were increasingly ruled by ideology and politics.

19.1.2 Key Phases of Reform and Innovation

In the mid-1960s, a phase of educational reform initiatives began in the Federal Republic of Germany. These arose from various sources, not least from an awareness of a looming “educational catastrophe” (Picht 1964). In particular, the German Education Council (*Deutscher Bildungsrat*),¹ founded in 1965, aimed to promote and academically monitor educational reforms through a number of recommendations and studies. All levels of the education system, from primary school to the upper secondary level of the grammar school and right up to the universities, were forced to undergo changes, albeit not radical ones. Furthermore, new educational institutions were created, for example, comprehensive schools, *Fachoberschulen* (a specific type of upper secondary vocational school), *Fachhochschulen* (universities of applied sciences), and new universities. Broad admission to institutions of further education was made possible and the proportion of *Abitur* (university entrance qualification) holders rose to 30 % of an age cohort. The changes carried out or introduced at that time still determine to a large extent the educational landscape in Germany.

In the contemporary GDR, remarkable efforts were made to modernize both the structure and the contents of the school system. On the other hand, the system pursued a clear function of selecting pupils on sociopolitical criteria (e.g., only about 12 % of an age cohort had *Abitur*). The fall of communism in the GDR in the autumn of 1989 resulted in the demolition of an education system developed in the course of more than 40 years. The “Round Tables,” which had arisen mainly from the citizens’ rights movement, first sought to reform the GDR education system and later attempted the balancing act between the most tried and tested elements of the GDR school and the fundamental structures of the federal German school system. In the end, however, the efforts invested in the process of “bringing both systems together” mostly led to adapting the East German to the West German order. Since the reunification of Germany on 3 October 1990, the federal structure has also been applied to the newly formed East German *Länder*. In contrast to the old *Länder* and the differentiated school system found there, the new *Länder* of the former East Germany developed their own school system based on the Hamburg Convention of 1964 putting it into practice with a degree of success. Even if a new phase of educational development started in Germany with the German Reunification, the antiquated state of the education system only became a real public concern after the

¹The *Deutsche Bildungsrat* [German Education Council] existed from 1965 to 1975. This panel of academics and government representatives was established to formulate development plans for the German education system, proposals for structural changes, and recommendations for long-term education planning.

results of international surveys on pupil performance (especially TIMSS and PISA) were published. Nevertheless, the Standing Conference of the Ministers of Education and Cultural Affairs (KMK) set course for a lasting empirically based evaluation of the school system in its Constance Resolution dated 24 October 1997.

The recommendations² on five issues spanning many fields of education made at the end of 2001 by the *Forum Bildung*³ (Forum for Education) were an important contribution to the discussion on changes in the German education system. These five recommendations focused on future educational and qualification targets, the promotion of the equality of educational opportunities, quality assurance in the context of international competition, lifelong learning, and the new culture of learning and teaching. Nevertheless, the recommendations of the *Forum Bildung* were unable completely to fulfill the role assigned to them as initiators of an educational reform in Germany. Furthermore, they failed to play their intended part in the public discussion and were even marginalized by the PISA results. A whole range of recommendations are found in the measures of the *Länder* governments decided upon by the Standing Conference of the Ministers of Education and Cultural Affairs (KMK) in December 2001 for improving school education in Germany as a consequence of the results of the PISA survey. These measures initiated by the KMK and by now largely implemented concentrated on seven fields of action: linguistic skills, dovetailing the preschool domain and primary school, primary school education, promotion of educationally disadvantaged children, securing quality of instruction and of schools, professional development of teachers, and full-day schools.

Besides structural and organizational factors, the general education school system in Germany – when compared with the school systems of other industrialized nations – is characterized by two cultural traditions: the aims of the general education school system are not defined by the expectations of its “users”, and not pragmatically by the interests, needs, and development prospects of its “clients”, but largely normatively by the intellectual tradition of educational theory. What is taught how and to what end is not justified functionally for pragmatical purposes but from overriding ideas and cultural and educational traditions. This in part is the source of the standing discussion on the distinction/equal footing of vocational and general education. Even scepticism – the reaction of professional educators to the concept of skills as a target – is a result of this tradition. In this respect, one of the “idiosyncrasies of the German post-war education system is that success is not measured on its effectiveness – however this is defined – but on its successful political implementation” (Arbeitsgruppe 2003, p. 45).

²With the *Forum Bildung*, which was established in 1999 as a joint effort by the Federation and the *Länder*, an “Alliance for Education” was created which offered the chance to discuss the reforms of the education system and possibilities for implementing them across the boundaries of legal competencies.

³*Empfehlungen des Forum Bildung* [Recommendations of the Forum for Education]. Edited by the work team of *Forum Bildung* at the office of the BLK. Bonn 2001.

19.1.3 Political, Economic, and Cultural Conditions of the Current Education System

German society is characterized by great cultural and social heterogeneity. This provides people with chances to shape their lives individually. At the same time, however, common principles of coexistence are losing their importance. On the one hand, the education system has to rise to this challenge. On the other hand, the education system can contribute to social cohesion in a particular way.

The plurality of secondary school forms is the one feature in the German school system that best illustrates the principle of segregation aimed at homogenizing separate learning groups. The allocation of pupils to the different types of secondary school is influenced to a large extent by their social background. Studies have shown that children whose parents attained a low level of education have to achieve far higher performance levels in order to be recommended for grammar school, compared to those whose parents hold a higher education degree (Lehmann et al. 1997/1999). Therefore, it is generally established that success at school greatly depends on social background. This is especially obvious in the case of children and young people from migrant families. A whole range of different learning environments arise, so that individual pupils, in spite of having the same learning abilities, develop in quite diverse ways.

In 2009/2010, around 1,030,000 teachers were teaching in Germany at general education and vocational schools. However, the proportion of older teachers is relatively high seen in international terms. This is especially the case for the lower secondary education where more than 45 % of teachers are over 50 years of age. At present and for the years to come, there is and will be a relatively high need for qualified teaching staff (Autorengruppe 2012, p. 34). Women make up more than 60 % of the teaching workforce. In Germany, teachers are commonly trained at universities. The only exception is in the state of Baden-Württemberg where teacher training takes place at colleges of education. For a long time, teacher training followed a traditional pattern. After a standard period of study of six to ten semesters (depending on the type of school teachers are being trained for), teacher training at university is completed with the first state examination. This is followed by a practical traineeship phase of 18–24 months, the *Referendariat*, which mostly takes place at schools, and by the second state examination. The consequence of this staggered model of academic and professional teacher training meant that it took an average of 6 years to complete. In the majority of federal states, this traditional model of teacher training is subject to an extensive process of change. The most important elements of this changes include the standard international structure of bachelor and master degrees, strengthening the pedagogical and didactic aspects of training, and putting an emphasis on practice. Teachers who find a job are generally given civil servant status (in the new federal states, this generally only applies to school directors and for teachers of certain subjects). Because of this social protection and the relatively generous old-age pension which they can expect, the teaching profession enjoys high social prestige. Furthermore, in Germany, the wages of teachers are significantly above average earnings.

The remuneration of a teacher is dependent on the level of training achieved, on the school type in which he or she is employed, and on his or her age. The highest wages are paid to grammar school teachers and the lowest to primary school and *Hauptschule* teachers. The deployment of teachers is carried out according to school types and on the basis of the hours to be taught (mandatory periods). According to school type, teachers have to teach between 23 and 28 periods of 45 min per week.

School and family fulfill specific functions in the process of education, upbringing, and socialization. These functions are strongly influenced by the cultural environment of the family specific to its social status. The family plays a special role as an educational institution that prepares children for school and accompanies them while they attend school. The development and promotion of performance are particularly affected by the social and cultural conditions of the family. According to the Article 6 of the German Basic Law, the upbringing of children is both the natural right and duty of parents. The mission of schools therefore includes as a fundamental principle the observance of parental rights. The interaction of school and family is regulated by legal provisions at *Land* level. Parents' representatives, elected at regional and supra-regional level in classes, schools, and regions, have varying yet definite rights to voice their concerns about basic issues of educational policy, such as the design of the curricula.

19.2 Fundamentals, Organization, and Governance of the Education System

19.2.1 General Principles, Current Educational Policy, and Goals of the Education System

The Federal Republic of Germany is a democratic and social federal state. This means that any survey of the education system should consider not only Germany as a whole but also each one of the 16 *Länder* with its own legislation and government. Mandates for the education system are regulated by the federal structure. The Basic Law contains only a few fundamental regulations on education, culture, and science. For example, it guarantees the freedom of the arts, science, research, and teaching. It also guarantees the freedom of creed and philosophy of life, the free choice of a profession and of a professional training establishment, equality before the law, and rights of parents as legal guardians. Furthermore, the whole school system is under state control.

Education in Germany is oriented on an understanding whose goals are reflected in three dimensions – individual regulation, social participation and equal opportunities, and human resources. Individual regulations refer to the ability of an individual to plan and shape independently his/her behavior and relationship to the environment and his/her own biography and life in the community. The contribution of education to human resources refers not only to securing and developing a workforce – in both quantitative and qualitative terms – but also to the learning of skills that enable people to find work that matches their talents and abilities. The Basic Law obliges educational facilities to foster the learner's

participation in society and equal opportunities and to counter systematic disadvantage based on social origin, gender, and national or ethnic affiliation.

19.2.2 Basic Legal Principles of the Education System

Pursuant to Article 7 (1) of the Basic Law, the state, i.e., the respective *Land*, is responsible for supervising the whole school system. Supervision not only means controlling schools. In particular, it includes: defining the education and upbringing mandate of schools; planning and designing the organizational structure of the school system; determining the alignment of the school by listing educational and learning goals as part of binding curricula and timetables; setting key standards of performance and assessment; drawing up a school constitution; regulating the legal position of teachers, of compulsory schooling, and of the relationship to the school; and approving textbooks and other learning materials. All significant decisions made in relation to the school system are the reserve of the legislature, i.e., the parliament of the *Länder*. Implementing the laws and administering the school system are matters for the state school administration board.

According to the Basic Law, it is the responsibility of the federation to pass legislation relating to the support of children and young people within the framework of social legislation. This also applies to the provision of nursery schools and kindergartens. The *Länder* are expected to give this legislation more concrete form by passing their own laws. Where the primary level is concerned, the Basic Law and the constitutions of the *Länder* contain a range of fundamental regulations on the school system (school supervision, rights of parents and learners, compulsory education, religious instruction, private schools, and types of schools); some constitutions of the *Länder* also contain guidelines for regulating higher education, continuing education, and libraries. The *Länder* are solely responsible for the whole school system. The legal foundation for primary schools as the first compulsory school for all children is the school laws and ordinances of the *Länder*; the latter are passed by the ministers of education and culture for the *Länder*. The secondary level comprises general education as well as vocational school instruction. Grounded in educational legislation are the laws of the *Länder* concerning school administration, the contents of the courses, and the leaving certificates and qualifications that can be acquired at the end of the lower and upper secondary level. The legal regulations for vocational training in industry and handicrafts are contained in the Act on Vocational Training and the Act Regulating Handicrafts passed by the federal government. At the higher education level, the legislation on higher education of the *Länder* provides virtually the whole of the legal basis.⁴ According to Article 91b of the Basic Law, the federal government and the *Länder* may work

⁴The Higher Education Act that contained framework guidelines for higher education legislation issued by the *Länder* based on Article 75 of the Basic Law was repealed as part of the federalism reform of 2006.

together on cases of national significance to support: (1) academic research facilities and plans outside of universities, (2) academic and research plans at universities, and (3) research buildings at universities, including large equipment. Based on this article, the federal government and the *Länder* concluded an agreement to form the Joint Science Conference (GWK) which replaced the *Bund-Länder* Commission for Educational Planning and Research Promotion (BLK) in 2008. Ultimately, the federal government and the *Länder* can work together based on agreements to determine educational achievement in international comparisons and to compile reports and recommendations in this respect (Article 91b (2) Basic Law). Legislation on higher education passed by the *Länder* applies to all public higher education institutions and contains some provisions for the private higher education system. Adult education is ruled by the state to a lesser extent than the other educational sectors. Districts and municipalities maintain continuing education centers that serve adult education. State activities in the field of continuing education are limited to laying down fundamental rules and regulations related to organization and financing. Legislation covering adult education is the responsibility of the *Länder* parliaments, whereas the federal government is responsible for regulating vocational education (continued education, retraining, rehabilitation), maintaining national further education facilities, and protecting learner rights in distance learning programs.

Besides the *Länder*, districts and municipalities also have responsibilities for the school system. Traditionally, they are responsible for external school affairs, i.e., for planning, establishing, organizing, equipping, and maintaining schools in their area. Recently, districts and municipalities have increased their efforts to take on greater responsibility for issues relating to school development and quality (Erklärung 2012).

19.2.3 Governance in Education

To date in Germany, school governance – and the quality assurance associated with it – has been mainly implemented by legal and administrative regulations. Since the whole school system is under the control of the state, the *Länder* have created school supervision at two to three levels. The key instrument available to the *Länder* within their scope of competencies to implement educational policies and control the school system was school supervision. Each of the 16 *Länder* has its own school administration which comprises several levels and which is responsible for school supervision in a narrow sense. At the head of school supervision is the education/culture ministry in each *Land*, which is also responsible for other areas beyond the school system. The Ministry of Culture is responsible for issuing the most significant guidelines on developing the school system. As soon as there is a need to consider important areas of the school system – especially those that call basis legal matters into discussion – these guidelines need to be formulated by the respective legislative, in other words the parliament. The Ministry of Culture issues ordinances and decrees dealing with the distribution of subjects and the number

of hours allocated, curricula, approval of textbooks, regulation of pupil careers (giving marks, repeating a school year, transfer to other types of school), frequency of lessons, and teacher appointments. School supervision comprises specialist monitoring of the school's educational and upbringing work, the legal monitoring of the district and municipal maintainers of schools, and the service monitoring of educational staff. In the context of discussions on strengthened decentralization, the activities of school supervisions are currently restricted largely to consultative and supportive tasks.

In addition, there is a network of regulating factors, including initial and in-service teacher training, subject lessons, teaching plans and curricula, textbooks, and timetables. Above all, state regulations concentrate on three major areas. The first major area concerns what children should learn at school. This means timetables, subject-allocation plans, curricula, and procedures for licensing textbooks. The timetable acts as an important instrument in this area, which corresponds to the subject-teacher principle and time rhythms. A second area is concerned with standardizing status-relevant school career decisions, that is, the examination, transfer, admission, and leaving certificate regulations. These regulations ensure the formal continuity of assessment performance and standardized assessment procedures at school. The third area concerns regulations on the organization of instruction, such as determining the number of pupils per class, the frequency of lessons, the number of teaching hours, or the type of instruction-related differentiation. While exact legal and administrative regulations apply in these cases, fewer standards apply to the preparation and implementation of instruction, educational work outside of the classroom, cooperation among teachers, and in-service training.

Until a few years ago, this traditional understanding of educational governance in Germany was also described as input control. Education was monitored with the help of input factors such as financial funds, staff training, and deployment of equipment and most of all through legal and administrative regulations. This was based on the assumption that this would automatically achieve the results (output) desired. The paradigm shift from an input-oriented to an output-oriented model of monitoring entered educational politics through local administration. At the heart of it is an emphasis on the result-oriented process of monitoring. This led to greater room for maneuver for each school and at the same time contributed to shortening the distance felt toward empirical comparative studies and the instrument was increasingly used in evaluations. Today, comprehensive educational monitoring, which now embraces standardized test and comparative work, national and international studies of school achievement, and educational reports, is part of the fixed repertoire of control functions in education.

19.2.4 Funding Education and Its Institutions

Most education institutions are financed by the *Länder* and local authorities. These in general fund the infrastructure and staffing. Only in exceptional cases does the federal government fund educational facilities. Even private schools

(independently funded) are largely state financed in Germany. Regional differences are negligible. Public educational facilities are financed through direct funding from the public budget and only to a very small extent through school or study fees. Decisions are taken at all three levels of the political and administrative hierarchy in Germany (federal government, *Länder*, municipalities) on the financing of education. Most funds (about 95 %) are provided by the *Länder* (80 %) and the municipalities (15 %). The institutions of the preschool sector are co-financed by public and nonpublic bodies, i.e., by the municipalities, welfare associations, and the churches. Public and voluntary services receive allowances for material and staff costs. The preschool sector is not part of the state school system, so attendance at nursery school or a kindergarten is generally subject to a fee. The amount of fees that parents pay depends on their income. Attendance at public schools is free of charge. The state school system is financed on the basis of the division of competencies for internal and external educational affairs between the *Länder* and the municipalities. The *Länder* bear the costs of internal educational matters such as the payment and provision of teaching staff, the development and introduction of curricula, in-service training, etc. The municipalities on the other hand cover the costs of external educational matters such as the construction and maintenance of schools, securing sufficient choice of types of school, the salaries of non-teaching staff, etc. Generally, municipalities are responsible for school transport and for the provision of teaching materials. Every *Land* supports the municipalities through funding, e.g., grants for the construction of school buildings or for certain operating costs. The payments made by the municipalities cover around one-fifth of the costs of the school system, while the *Länder* cover the largest proportion of the total costs. Regulations governing the funding of teaching materials, especially of textbooks, vary from *Land* to *Land* ranging from full coverage of costs and lending textbooks through to parental contributions to the costs of teaching materials. Public institutions of higher education are fully financed from the budget of the ministries for science and research of the *Länder*. At present, they do not charge fees. Up until 3 years ago, seven *Länder* charged tuition fees of up to 500 euros per semester. The last two *Länder* – Bavaria and Lower Saxony – abolished fees in 2013/2014 or announced that they would abolish them in 2014/2015. The continuing education sector is funded by public authorities, private enterprises, corporate groups, trade unions, business associations, political parties, churches, social groups, and independent institutions of continuing education.

In 2009, Germany spent 225 million euros on education (Autorengruppe 2012). This corresponds to 6.9 % of GDP (in 2010, it was even 7.0 %).

19.2.5 Relationship Between the Public and Private Sector

School legislation in all the *Länder* provides that private schools (independently funded) may be set up in addition to public schools. Despite continuous growth in recent years, accommodating roughly 10 % of the pupil population (2009/2010), private education plays a relatively minor role. They are divided into replacement

schools and complementary schools. Replacement schools correspond to comparable public schools. They fulfill the requirements of compulsory schooling, whereas complementary schools do not. Although complementary schools have the character of a school in terms of the nature of work, teaching, and organization, they do not comply with the educational laws of the *Länder*. Replacement schools must be approved by the state, complementary schools do not. The latter are usually not entitled to issue rights recognized externally (such as final school leaving certificates). Generally, state monitoring for these schools is restricted to compliance with general legal requirements. In state-approved replacement schools, state supervision ensures that schools meet all necessary requirements even after approval has been granted and that all examination regulations and regulations governing repeating a school year that apply to public schools are complied with. The governing bodies of private schools can be not only churches or other institutions under public or private law but also private persons. In the private sector, most schools are confessional schools or Waldorf schools (schools that follow the principles of Rudolf Steiner).

Private schools receive various forms of state subsidies. This is based on judgments passed by the Federal Administrative Court and the Federal Constitutional Court on prohibiting the segregation of pupils according to the means of their parents (Article 7 (4) Basic Law) which stipulates that private schools do not have a free hand in determining the extent of school fees. Approved private schools have the right to claim standard financial help provided by the *Land* and subsidies to cover those costs that the state would spend on a comparable student at a state school. Public funding of private schools regulated in *Land* legislation and in supplementary regulations depends on whether the school is an approved or recognized replacement school, a recognized complementary school and church replacement school, or a boarding school.

19.2.6 Quality Development and Support for Educational Facilities

Since the beginning of the 1990s, there have been plans in the *Länder* aimed at intensifying quality assurance. Mainly, as a result of the PISA surveys from 2000 to 2003, and of the supplementary PISA for Germany's *Länder* (PISA-E), the federal government, the *Länder*, and schools in Germany have increasingly put their conventional system of quality assurance to the test and have intensified their search for new solutions. For the school sector, the KMK concluded an overall strategy for monitoring education in summer 2006. Its main components include:

- International surveys of school achievement
- Centralized assessment of the attaining educational standards in a *Länder* comparison (for years 3, 8, and 9)
- Comparative work in connection with educational standards to assess the performance of individual schools
- Joint educational reports compiled by the federal government and the *Länder* mentioned above

The heart of reform efforts to increase quality in education in the past few years has focused on the transition from the traditional half-day school to the full-day school. The development and expansion of full-day education and care has followed a wide variety of organizational and content-related concepts. These offers range from a variety of facilities such as full-day schools or care centers on the one hand to offers covering support with homework and a wide variety of courses and programs on the other. In 2011/2012, every second school in Germany offered full-day school program of sort.

As a rule, there is no support staff such as social workers or school psychologists at German schools. The school psychology service is administered by the maintaining body or the education office and is usually responsible for a large number of schools. They are however an important element in the support system for schools. Other elements in the support system include local education authorities, social workers, in-service training facilities, school-based and subject-based advisory service, specialist information and media service, cooperation partners in the region, and last but not least parents and other voluntary auxiliary staff.

19.3 Overview of the Structure of the Education System

Early childhood education, care, and upbringing in crèches, kindergartens, and other facilities are not by and large formal elements of education, and as such they are allocated to the Ministry of Youth and Social Affairs. Early childhood education normally relates to children aged up to 7 years. Attendance at a preschool facility is voluntary.

For all children in Germany, compulsory schooling begins at the age of 6 years and generally lasts 12 (including vocational training). For all children in Germany, compulsory schooling generally consists of 9 years of full-time school (10 years in Berlin, Brandenburg, Bremen, North-Rhine Westphalia, and Saxony-Anhalt) and 5 days a week for general education schools. Then, as part of their subsequent vocational education, pupils have to attend vocational school for 2 days a week for 2–3 years (part-time compulsory schooling). Young people not involved in a training program are offered courses preparing them for the world of work. Furthermore, in most *Länder*, there is the possibility of completing a tenth school year, thereby acquiring supplementary qualifications. Compulsory schooling also applies to children and young people with handicaps. Depending on their special schooling and support needs, they attend either a regular school together with non-handicapped pupils or a special school.

At the end of the comprehensive primary school, children attend one of the schools at the lower level of secondary education. The school they visit depends on parent choice and pupil performance. At the end of a school year, pupils do not automatically proceed to the next year/level. Instead they are “moved” depending on the level of achievement. Pupils with considerable deficits in achievement usually have to repeat the year. Each year, this affects just under 2.5 % of the pupil population between primary school and the upper level of secondary

education. Lessons take place mainly in the mornings, even if the proportion of full-day schools is growing.

The school system in the 16 *Länder* currently has the following structure:

- Primary school comprises 4 years in all *Länder* except for Berlin and Brandenburg where it comprises 6 years.
- The lower level of secondary education is organized differently from *Land* to *Land* and covers between two and five tracks. The only school form that exists in all the *Länder* is grammar school – *Gymnasium* – which starts in year 5 or year 7, with *Abitur* after year 12 or 13. The traditional three-track school system consisting of *Hauptschule*, *Realschule*, and *Gymnasium* which had characterized the German school system for a long time no longer exists. In recent years, there has been a series of structural developments in schools which has led to a reduction to two tracks in some *Länder* and to a parallel differentiation of education services in other *Länder* of up to six types of school. At present, the primary school and the grammar school exist in all *Länder*, plus between one and five other types of school. In Baden-Württemberg, for example, there is currently the *Haupt-/Werkrealschule* (a type of technical secondary school), the *Realschule* (a secondary modern school), and the community school. In Bavaria, there are middle schools, the *Realschule*, and the business school. Berlin has an integrated secondary school and the community school (still in the test phase). Brandenburg has the comprehensive school and the *Oberschule* (upper school). In addition to the *Gymnasium*, Bremen has the “secondary school” and the comprehensive school. Hamburg only offers community schools in addition to the *Gymnasium*. Hesse has *Hauptschule*, *Realschule*, connected *Hauptschule and Realschule*, comprehensive schools, and middle schools. Mecklenburg-West Pomerania offers comprehensive schools and regional schools. In Lower Saxony, there are *Hauptschulen*, *Realschulen*, *Oberschulen*, and comprehensive schools. Rhineland-Palatinate offers the *Realschule* and the comprehensive school. Besides the *Gymnasium*, Saarland also has community schools. Saxony offers middle schools in addition to the *Gymnasium*. In Saxony-Anhalt, children can attend the comprehensive school in addition to the secondary school. In Schleswig-Holstein, there are regional and community schools. Finally, Thuringia has *Regelschule*, community schools, and comprehensive schools (still in the testing phase).
- All *Länder* also provide special schools to support disadvantaged/disabled children, and preference is given across the board to the inclusion of such children in regular schools and classes.
- The upper level of secondary education includes general education schools (upper level of *Gymnasium*) and vocational education. Nearly all *Länder* now offer the *Abitur* after 8 years attendance at secondary school or after a total of 12 years at school. Passing the *Abitur* examination entitles pupils to attend university. The vocational part of the upper level of secondary education consists mainly of three-part systems of vocational education: the *dual system* – training for a recognized profession, blending training at the workplace

with college-based training, the *school vocational system* – training for a legally recognized profession in full-time school form in the sole responsibility of the maintaining body, and the *vocational transition system* – training instruction below the level of qualified vocational training and which does not lead to a recognized qualification. This serves solely to improve individual skills of young people with the aim of securing a training place or employment or allow pupils to retake examinations in the general education area. Under certain circumstance, students graduating from vocational training may continue their education at a university of applied science.

- The higher education system consists of universities, other academic institutes of higher education – both of which require students to have passed the *Abitur* examination – and universities of applied sciences set up in 1969, with their stronger practical orientation and less demanding research orientation. Higher education study in so far is free of charge; some *Länder* are contemplating re-introducing tuition/course fees. The conventional programs differ according to structure, duration, and type of qualification (diploma, state examination, *magister*, bachelor, master). As part of the Bologna Process to produce a uniform European higher education landscape, over 80 % of programs have now been converted to the bachelor/master system.⁵ A differentiation between university and university of applied sciences based on duration and type of qualification no longer applies in the wake of the Bologna Process. BA programs last 3–4 years and MA programs another 1–2 years (overall duration is 5 years). Doctoral programs are usually only offered at an academic university to students holding a diploma, a state examination, or an MA degree. MA graduates from universities of applied sciences can also be admitted to doctoral programs at university.
- Adults can catch up on school-based qualifications through second-chance education (at colleges and evening school). This offers an extensive system of general continuing education and professional development and training.

In structural terms, the school system in Germany is at best a “partly integrated system” that, after a relatively unitary elementary and primary level, splits into different parts at lower and upper secondary levels, at higher education level, and at the level of further education. This structure, which is different from *Land to Land*, and covers both school forms of varying levels and institutions of vocational training, confers upon the German education system, and especially the school system, a degree of differentiation, visible at an early stage, and numerous transfer decisions that make Germany stand out in international comparison.

Corresponding to the traditional three-track school structure, there are, in the German school system, generally three school leaving certificates: the *Hauptschule* leaving certificate (*Hauptschulabschluss*), the *Realschule* leaving certificate (*Mittlere Reife*), and the *Abitur*. Pupils at special schools can also obtain these

⁵Still open is the conversion of programs in law, medicine, veterinary medicine, and pharmacy (as at 2009).

qualifications. Holders of the *Hauptschule* leaving certificate are entitled to entry to a vocational school, and it is the admission requirement for an apprenticeship and for training as a skilled worker in the industrial and commercial professions. Besides the opportunity of gaining a higher qualification – in this case the *Mittlere Schulabschluss* – some professions accept this as an entry qualification, depending on the *Land*. School leavers with the *Mittlere Schulabschluss* usually have a wide range of options open to them in terms dual system apprenticeships, full-time school vocational training, and the continuation of their education in order to achieve entrance qualifications for polytechnics/universities of applied sciences. They can also study for all the professions available in the school vocational track. School leavers with entrance qualifications for polytechnics or with *Abitur* have a multitude of professional and academic education options available to them. They can study at a polytechnic, for example. The *Abitur* however is required for university study; it is also an entrance qualification for polytechnics. In some *Länder*, it is possible for pupils to acquire a specialized entrance qualification which allows students to study only a narrow range of subjects. The main path followed by holders of the *Abitur* takes them to university study – without any detours or queues. On top of this, they can also choose highly attractive vocational training options.

While the traditional three-pronged school system provided a relatively clear allocation of qualification to type of school, in recent years, there has been a significant decoupling of educational program and school qualification, not least because of the structural developments that have taken place in schools. Today, school qualifications can be acquired at different types of school. These qualifications acquired in the school types – mostly through examinations – are tied to certified entitlements to visit further educational and training facilities. The leaving certificates obtained after successful completion of the different school types qualify for certain admissions, which can, however, be restricted, for example, by a *numerus clausus*.

19.3.1 Preschool Sector

All children who have not reached compulsory education age belong to the elementary sector (*crèches*, *kindergartens*, and other care facilities). Nursery schools and *kindergartens* or other care centers for children of preschool age are mostly municipal institutions or institutions run by independent bodies. Normally, parents have to pay a fee for preschool education. As a rule, children begin school at the age of 6. For children who are of school age but who are not sufficiently physically or intellectually developed to attend school, there are preschool programs in school *kindergartens*. Whereas preschool education is the responsibility of the Youth Welfare Service (for whom the social ministries, as a rule, are responsible), a few *Länder* have, as part of the school system, specific preschool classes for 5-year-olds, who are not yet of school age, or school *kindergartens* for 6-year-olds who are not “mature” enough to attend school.

19.3.2 Primary Education

Compulsory schooling starts with the primary sector. The primary sector covers years 1–4 (in Berlin and Brandenburg, years 1–6), which means that, as a rule, children attend primary school together from the age of 6–10 (or 12). During the two first years, primary school children are given neither numerical grades nor a school report. Instead, they receive detailed assessments of their learning behavior, their learning progress, and their behavior within the group. It is only from year 3 that verbal assessments are gradually replaced by numerical grades. At the end of primary school, pupils once more receive a verbal assessment, this time in addition to their numerical grade, along with a recommendation for the school they should attend at lower secondary level.

The transfer from primary school to the next level is a key indicator for the course of the future school path for many pupils and their parents. The decision about which school to attend at the lower secondary level is usually tied to certain institutional requirements of achievement and related leaving certificate option and the parental preferences. The decision is a joint effort on the part of school and home, whereas parental preference has precedence. In some *Länder*, additional selection procedures are used.

19.3.3 Lower Secondary Education

The lower level of secondary education refers to schooling for children aged 10, or 12, to 16 years. In the German system, the lower secondary education is undergoing, or will soon undergo, the greatest change. For more than three decades, the lower secondary level has been one of the most debated sectors of the German school system, both from an academic point of view and with respect to school policy. At the center of the debate are always the questions of the relationship between the fostering and integration of all pupils on the one hand and appropriate differentiation according to skill and performance on the other. Until the beginning of the 1980s, this problem had culminated in the following question: is differentiation according to various types of school, or rather internal differentiation within a comprehensive school the solution to be implemented on pedagogical and organizational grounds, and should the three-track school system (*Hauptschule*, *Realschule*, grammar school) be preserved or be replaced partially or completely by a comprehensive school system? For more than two decades, discussion concerning the form of the lower secondary level revolved around the controversy in Germany over structural alternatives. Debate on the competing systems at the lower secondary level subsided following the agreement of the KMK on school types and courses at the lower secondary level in 1993, but it has flared up again. In the course of school and structural reform – which on the one hand is aiming at improving the quality of education, while on the other hand,

motivated by demographic developments with dwindling public funds (especially in non-city *Länder*) – there is a tendency toward reducing multi-track options available in lower secondary education.

The concept of an integrated or cooperative comprehensive school was developed at the beginning of the 1960s, based on a critical attitude toward the tracked school system, its – at that time – outdated features, and its social selectivity. The notion of integrated comprehensive schooling envisioned the replacement of the relatively rigid vertical structure of the school types at lower secondary level with a more varied and flexible organization of instruction within one school. After a trial phase, the comprehensive school was formally accepted as an integral part of the German educational landscape in 1982. As a result of the introduction of the comprehensive school, conventional school types also made changes, albeit to differing extents. The decisive transformation consists in increased mutual permeability, whereby the three-track school system acquired hitherto unknown interconnections and versatility and in the breaking up the close coupling of type of school and qualification. Comprehensive schools with a grammar school-like upper level are particularly important because they now offer all pupils the path toward the university entrance qualification. In Germany, special needs schools and schools governed by private bodies (years 5–10), the evening *Hauptschule* and *Realschule*, the vocational further education schools, and the 1-year work-life preparation school (*Berufsvorbereitungsjahr*) are also part of lower secondary education.

Subjects taught correspond in both primary and secondary sectors by and large to the general international school curriculum and related standards. However, in Germany, there is a remarkable consistency in subjects, in particular the core subjects, and in the distribution of subjects across the timetable. In the last few decades, only a few new obligatory subjects have been added. Worth mentioning here is mainly the growing importance of the first foreign language (mostly English), which is taught in some *Länder* from the primary school, the introduction of the second foreign language, the creation of IT as a subject, and the extension to working studies/business/technology. The minimum amount of hours that a pupil spends in class in Germany up until the end of year 9 amounts to 9,100 (weighted average by *Länder* and school reform). German and mathematics play a significant role in both primary and secondary education. Nevertheless, there are considerable differences between these two subjects from *Land to Land*. These differences are in part even greater in the weighting of other subjects.

Religious education is a mandatory subject at public schools, except for nondenominational schools, and is taught in agreement with the principles of the religious communities. This does not affect the rights of parents and pupils to decide whether or not to attend religious education classes. Pupils do have to right to be released from religious education classes. Religious education is a normal taught subject and is on equal terms with other subjects in the curriculum and in the overall school organization. This means that grades are also awarded. It is also subject to state supervision.

19.3.4 Special Schools

Children and young people who cannot follow regular lessons in general education schools under the prevailing educational, personnel, and organizational conditions can make use of special educational needs instruction. In 2010/2011, 487,000 pupils fell into this category. This corresponds to 6.4 % of the pupil population in years 1–10 (in 2000/2001, it was 5.3 %). Special schools can be classified into different types according to the nature of handicap they cater to and include schools for learning-impaired children, which are the most strongly represented, followed by schools for mentally handicapped children and for language-impaired children. Special schools have been especially set up with physically handicapped children in mind. All *Länder* have prioritized integrated learning or inclusion in otherwise general education schools compared to transferring handicapped pupils to special schools. At present, nearly 30 % of all pupils with special education needs are taught in integrated facilities. The special schools span the primary and the lower secondary level, and in the case of physically and mentally handicapped young people, it also stretches to the upper secondary level.

19.3.5 Upper Secondary Education

In Germany, years 11–12/13 of grammar schools, integrated comprehensive schools, the Waldorf schools, and the special needs schools are regarded as belonging to upper secondary education. The same applies to the 2-year technical grammar school, the vocational skills schools (where a qualification to study can be obtained), the vocational fundamental formation year, the vocational schools of the dual system (block system), and the 1-year schools of the health system.

A radical change occurred at the upper secondary level of the grammar school when, at the beginning of the 1990s, the KMK passed a regulation lowering the period of learning to obtain the *Abitur* examination. This enables the *Länder*, under certain circumstances (at least 265 periods at lower secondary level and the upper level of grammar school), to decide if grammar school instruction can be completed after 12 or, as has hitherto been the case, after 13 years of schooling. Meanwhile, in nearly all *Länder*, there are grammar schools that can be completed within 8 years (years 5–12).

Vocational education, as the means to a first professional qualification, represents, alongside the general education schools and the institutions of higher education, a relatively independent sector of the education system. Since 1964, it has been organized according to the so-called dual system, which is characterized by vocational practical training in an apprenticeship with accompanying instruction in vocational full-time schools, while the core education is traditionally provided in the working environment and in the transition system. Dual system is essentially a cooperation between two “learning locations” (vocational school and on-the-job instruction). The training usually lasts 3 years. The apprentices receive a monthly apprentice wage from the employer. The instruction at the vocational school

occupies 1 or 2 days in the week and is sometimes carried out in intensive blocks. The syllabuses contain a general education part (German, social sciences, sport, and religion) which make up around 40 % of the number of taught hours, and a subject-specific part, which consists mostly of theory related to the chosen vocation. Full-time courses for specific vocations represent the largest group among vocational education courses at vocational schools. Behind the common description of vocational school lies a very wide range of institutions with a variety of governing bodies, fields, durations, and entitlements. Basically, the entrance requirement for any vocational school is the *Hauptschule* leaving certificate. The training usually lasts 1, 2, or 3 years, and the certificates and qualifications obtained at the end of the courses can serve either as an entrance qualification for further education or as a qualification in a recognized trade. More than a quarter of vocational schools are maintained by private bodies.

19.3.6 Higher Education

The German system of higher education today comprises over 350 institutions, including universities, technical universities, arts and music colleges, universities of applied science, colleges of education, and a small number of professional academies. Entrance qualifications are usually obtained at the age of between 18 and 21. The age structure of the students is not homogeneous. All higher education degree courses leading to equivalent degrees (diploma, magister, state examination, bachelor, and master degree) are regulated by framework regulations. The framework regulations contain quantitative reference data for degree courses, among others the standard duration of studies, the number of instruction hours, compulsory and optional subjects, the number of continuous assessment assignments that have to be passed, and details of the examination and the accepted time frame for the completion of the end-of-studies thesis. Since the creation of universities of applied sciences in 1968, a “double structure” has characterized the German higher education system. The genuine universities and the universities of applied sciences, having different entrance requirements and offering different types of degrees, are relatively delimited areas. In Germany, it is commonly accepted that only places on degree courses attracting too many applicants have admission restrictions (a *numerus clausus*) and a selection procedure (e.g., courses of study for medicine or psychology). The admission modalities are handled by the Central Office for the Allocation of College Places (*Zentralstelle für die Vergabe von Studienplätzen – ZVS*) in Dortmund (according to grades obtained in *Abitur*, time on the waiting list, social aspects, and other criteria).

19.3.7 Adult Education

Continuing education and lifelong learning have a central place in political and academic discussions. Due largely to demographic trends and ongoing

developments in creating a knowledge-based society, the willingness and ability of individuals to continually develop and learn is seen as an essential condition for both economic development and the competitiveness of the economy and for social participation and integration. In addition to the offerings of publicly funded continuing education facilities, the development and training services presented by companies are highly significant given that movements in the quality of staff can be applied directly to the world of work.

A particularly relevant area of professional further training for education concerns in-service teacher training and the training of future head teachers. In-service teacher training is primarily supply led, being largely, but not exclusively, maintained by institutes of school quality and in-service training available in all of the *Länder*. In addition, there are regional and school-based programs. For future head teachers, there is both special training as well as continuous training parallel to the job. Generally speaking, teachers apply for positions as school heads or as *primus inter pares* (first among equals) and grow into the task through “learning by doing.” The working hours of head teachers and teachers are comprised of management time and teaching time. The increasing pedagogical and administrative responsibilities of schools have led to increased demands on head teachers. It is already the case that the functions carried out by a head teacher demand high pedagogic and management qualifications.

19.4 Developments in the Current School System

19.4.1 Transition Between Levels of Education

A particular feature of the German school system is the relative diversity of transition and change options compared to school systems in other nations. While transition primarily occurs at thresholds in the school system having to be managed by all pupils, change offers pupils the possibility of moving from the school type or program chosen originally to another.

After starting school, the transition to the lower level of secondary education for year 5 (year 7 in Berlin and Brandenburg) is the second most important point in the German school system. Although transition usually takes place at the end of primary school, transitions are still possible or even envisaged after year 6 (after the so-called observation or orientation phase). The manifold types of school with their specific educational and professional traditions, their social milieu, and their curricular and didactic orientation influence all aspects of the general education school system in Germany, from lesson practice to the organizational structure of the ministries. This applies if one includes the parallelism that exists between primary school and special education schools from the beginning and continues through the upper secondary level.

Even though the distribution of pupils following primary school manifests huge difference from *Land* to *Land*, there are still two broad-ranging tendencies. One of them is the fact that in all the *Länder* that provide *Hauptschule* – Brandenburg, Bremen, Mecklenburg West-Pomerania, Saarland, Saxony, Saxony-Anhalt, and

Thuringia do not maintain *Hauptschule* – the transition rate to this type of school has reduced in recent years. The *Hauptschule* is still strongly represented in Baden-Württemberg (25 % in 2010/2011) and Bavaria (Autorengruppe 2012). Besides these two *Länder* and some other isolated examples, the demand for the *Hauptschule* has changed dramatically in the last 20 years. While it continues to be an accepted form of school, it will continue to be less in favor – even in regions with hitherto brisk demand. The PISA studies 2000–2012 showed that nationwide roughly every third or fourth *Hauptschule* is working in very difficult conditions characterized by a high proportion of children from migrant families in connection with a low social status of pupils who often suffer from learning difficulties and behavioral problems.

A second line of development manifests itself in the continuous increase of pupils transitioning to grammar school. Now, in the majority of *Länder*, the majority of pupils transfer to the grammar school after year 4. However, as documented in studies and analyses in educational reports, as before, this is to the disadvantage of young people of lower social groups and migrant backgrounds.

19.4.2 Quality Developments

The *Länder* draw on an array of educational activities and measures in their attempts to secure and develop the quality of schools and education. In the last few years, major gains in this direction have been achieved by the establishment of an evaluation and inspection system for schools, the implementation of central final examinations for school leaving certificate and by shortening attendance at grammar school by 1 year. Expanding the independence and autonomy of schools, developing initial and in-service teacher training, and extending efficient school support systems such as the full-day education and care services have all contributed to setting meaningful conditions to secure quality. Recently, new forms of quality management have been developed and established in all *Länder*. For instance, this includes new quality and evaluation agencies, external evaluation and school inspections, and education report at *Land* and municipality level.

As a result of the reforms triggered by the PISA findings, educational aims and content defined in the curricula have been more strongly bound to anticipated results of learning (i.e., the skills). This in particular has meant agreeing, implementing, and monitoring educational standards. As part of this, the KMK gradually introduced national standards in core subjects for certain school years and examination classes which would eventually be binding nationwide. Educational standards represent a key instrument to provide orientation for educational work and to document and evaluate its successes. Regular checks will be carried out through Germany-wide tests. In order to support the efforts of the KMK in the assurance and improvement of educational output, an institute for quality development in the education system (*Institut zur Qualitätsentwicklung im Bildungswesen – IQB*) was founded. Its mission is to further develop, operationalize, standardize, and check educational standards in Germany. There are national standards at primary school (year 4) in German and mathematics;

for lower secondary school (at the end of year 10) in German, mathematics, biology, chemistry, physics, and the first foreign language (English/French); and for the *Hauptschule* final year (year 9) in German, mathematics, and the first foreign language. Parallel to the implementation of educational standards, a system for assessing the achievement of educational standards has been set up to enable *Länder* to make comparisons for years 3, 8, and 9.

Educational policy in Germany also responded to the demand for continuous monitoring, transparency, and controls in the form of a regular system of reporting on education. In Germany, up until 10 years ago, there was no continuous and overarching monitoring of the development of the education system (system monitoring), even though information existed on individual areas of the education system. In the autumn of 2003, a report on education was compiled and published for the first time.⁶ An indicator-based report commissioned by the federation and the *Länder* provides a picture of the whole education system has been published every 2 years since 2006. In the meantime, several *Länder* and many municipalities draw up their own education reports. Particular importance is afforded to the Municipal Monitoring of Education⁷ setup as part of the “local learning” program setup at the behest of the Federal Ministry for Education and Research.

19.4.3 Dealing with Special Problems

Attention needs to be drawn to a hotly debated issue in Germany.

A powerfully moving problem, not only within educational circles, is the high proportion of pupils who leave school each year without any qualifications. The situation is hardly eased by the increasing number of pupils who make use of a second chance to catch up on general education school qualifications. In 2010, around 53,000 pupils, in other words 6.5 % of the pupil population, aged between 15 and 17 years, left school without at least a *Hauptschule* qualification (certifying completion of the lower level of secondary education). Although the number of such young people has declined, in recent years, it is still large enough for it to be seen as a major social issue especially in view of the fact these young people will have to face future educational and professional uncertainties – despite the current rising demand for new trainees.

19.4.4 Measures to Integrate Pupils from Immigrant Families

Natural immigration and emigration processes mean that the demographic structure of Germany is changing and within the population of pupils in German educational and vocational facilities. Migration process not only affect the individual himself/herself

⁶Avenarius et al (2003)

⁷cf. Döbert (2010)

but also the structure/composition of the overall pupil population. The main migrant groups in Germany include working migrants from the 1960s from recruiting countries and their children, so-called resettlers and repatriates people of German origin coming from East European countries (especially those returning in the 1980s and 1990s), asylum seekers, and refugees.

The manner in which immigration is recorded in statistics is currently changing which can be described as a shift from the concept of foreigner to one of migration. Until recently, official statistics recorded immigration based on the concept of foreigner, on state citizenship. Since 2005, differentiation within the various immigration constellations is described as either based on individual or family migration experience (first or second generation), on legal status (German versus non-German), or on people who live in Germany with a “migration background”. In 2010, 19.5 % of the population of Germany had a migration background and this number grows the younger the people (23 % of 24-year-olds and 35 % of 1-year-olds). In ethnic and sociocultural terms, the future generation of users of the education system will be vastly different than the current generation; it will document a wholly different constellation of educational biographies and qualifications.

Unlike the widespread use of the concept of migration, most school-based statistics in Germany still only distinguish between German pupils and “foreign” pupils. As in the past, there is a huge disparity in the distribution of pupils in the different types of school which is manifest along the lines of migration and social issues. In 2010/2011, 61 % of 15-year-olds from higher socioeconomic strata attended grammar school compared with 16 % from lower strata; the converse was observed in the *Hauptschule* (5 % versus 27 %). At grammar schools, there are more than twice as many German pupils as “foreign” pupils. The school population at *Realschule* and the new comprehensive, secondary, and community schools largely reflect a balance between German and foreign pupils.

19.5 New Developments

The education system in Germany is currently facing a series of significant challenges and will continue to do so in the future. It is expected not only to combine issues of adjusting its structure to the birth rate and to changes in the age distribution in the population with internal improvements and meeting growing social expectations on the education of the forthcoming generation but also at the same time to react to far-reaching social changes. In this sense, the following developments stand out.

A first line of development consists in expanding the provision of early childhood education and care and at the same time improving the way it deals with growing cultural and social heterogeneity.

A higher proportion of children from migrant families will be joining the education system in the coming years. These children will be growing up under changing domestic conditions (e.g., continuing increase in the number of working mothers, differences in upbringing). Dealings with children and young people from migrant families and/or from families where education is not a priority and whose

own education has only been marginally successful represent a social and educational challenge across the board for which a whole range of measures have been adopted. In this context, particular importance is placed on expanding the provision of early childhood education and care and developing the quality of these services. Intervention and support measures for so-called educationally disadvantaged children – providing they are implemented early enough at the early childhood phase or at the latest during school – are worth the investment for society. Kindergarten facilities that also function as family centers can bundle and coordinate all the offers and services open to families with small children. In this way, low-threshold programs for families at risk can be combined with help in the upbringing of children and other socio-educational measures. This calls for *multidisciplinary teams and an intensive network and structure of operation* involving the other players in health and social affairs as well as in education. Kindergarten facilities are not equipped for this, neither in terms of staffing nor of organization. This also includes an awareness of approaches to *problem-based funding strategies*. Experience to date shows that facilities in social hot spots have a greater need for staff and other resources than facilities in comparatively calmer waters.

A second line of development concerns the eradication of regional and social disparities in education, including special support for high-achieving, gifted pupils. The aim here is to better prepare people to deal with the requirements of lifelong learning.

Given the different regional effects of demographic change, it is increasingly difficult in rural areas to maintain a sufficiently broad spectrum of educational services, especially when the numbers of people addressed continues to fall. Attempts are being made to counter this risk of entrenching regional disparities by creating a balanced network of educational services. For participants in vocational education, continuing education, and adult education, new concepts are being developed that will facilitate learning independent of time and space (e.g., virtual programs, e-learning, etc.). For the education system, demographic developments also combine the continuing growing challenge of ensuring educational services provided in sufficient quantity and quality and of keeping the thresholds to these services as low as possible, by providing them locally and linking educational elements in a creative fashion.

Efforts being made to intensify education, support, and care functions are highly visible. This applies in relation to children and young people suffering social and economic disadvantage as well as for gifted high achievers: there is greater flexibility with regard to educational careers and opportunities, and promotion and support measures have also been extended. In particular, focus has been placed on *differentiated support provided in schools and an increase in the quality of (full-day) school services* to take account of the growing heterogeneity of the younger population. However, believing that permeability can be ensured and individual support increased only by changing the structures of school is a political illusion. Examples of successful practice show that individual support is mainly achieved by aligning educational services to the needs of the target groups, by adequate curricular and didactic arrangements, and by sound pedagogical diagnostics. This has

given rise to the demand for developing new strategies to *professionalize* teachers and carers and by providing new concepts or initial and in-service training.

In addition, it implies that the previously *dominating separation of institutional learning* has been surmounted. Because the time children and young people have at their disposal is becoming tighter, joint responsibility and concerted efforts in education, i.e., through full-day schools, are being developed further. As a result, youth clubs and non-school partners such as music schools, sports clubs, and so on are being invited to act on an equal basis with full-day schools. They are not continuing the previous practice of offering services “in addition” to full-day school services.

A third line of development relates to early professional orientation and the improved management of the transition between institutions.

Developments in the last few years have shown that improving the management of the transition between school and job helps young people at risk – adolescents who leave school with a low or insufficient range of skills – by giving them support at an early stage to make sure that they complete vocational training successfully and can be integrated in the labor market. Low-qualified young men are a particular problem group, not least because their professional prospects are becoming ever more restricted in the light of the structural change in traditional men’s jobs. To optimize the transition between general education schools and vocational education, job orientation is continually being improved at school age. Used in conjunction with systematic counseling, internships/work placements, mandatory in the upper school year in all *Länder*, are promising processes.

Particular problems represent the young people who do not participate in vocational education but who get stuck in transition. To deal with this, *more transparent career paths* and *more attractive and practical services relating to second-chance training* for people without any professional qualifications are being developed and expanded. In this sense, qualification-based, modular training blocks leading to professional certifications are a way of attracting young people and adults gradually to obtain documented qualifications. Skills licenses/passports are the first of such approaches.

Fourthly, and lastly, is the productive dovetailing of vocational education and higher education.

Vocational education and university study partly address the same circle of people and focus on the same areas of training. In view of the demographic developments a new problem emerges: the growing need for highly qualified specialist staff and the simultaneous increasing need for people with professional qualifications in the middle-range segment. In a bid to avoid explicit competition between the two sectors, both fields of education are becoming intermeshed wherever possible. Opportunities for this are provided:

- By new forms of study (dual/block forms of study, distant learning, work/study programs) with studying and training on the one hand and professional practice on the other hand coming close together
- By increasing the permeability between vocational education and higher education, not least with the aim in mind of combining time-saving training options, such as by using a credit procedure

Even universities are providing a broader range of services. The systematic combination of initial and in-service professional training, undergraduate studies, and continuing education – an unfilled need until recently – is becoming increasingly important at university level. Opening up higher education for the professionally employed is changing the perception of training and development to one of biography, from one of study. Discussions are focusing on the development of new formats of study besides the present distinction between undergraduate and postgraduate study, for example, through work/study programs, blended learning, and other forms of learning.

In politics, falling numbers in certain areas are always tied to expectations of easing the financial burden on tight budgets and, by corollary, educational budgets. The lines of development discussed above – from early childhood education, through the expansion of full-day care in school, to maintaining local school services and vocational school offers in peripheral geographical locations – are already consuming a large proportion of potential savings. Necessary improvements in quality, especially when it comes to eradicating social/migration-based differences in educational success call for additional resources. In turn, successful resource management in education calls for a thematic approach to strategy development, without which it will not be possible to overcome the challenges in education emerging from demographic change.

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Panos Xochellis and Anastasia Kesidou

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20.1 History and Social Parameters of the Education System

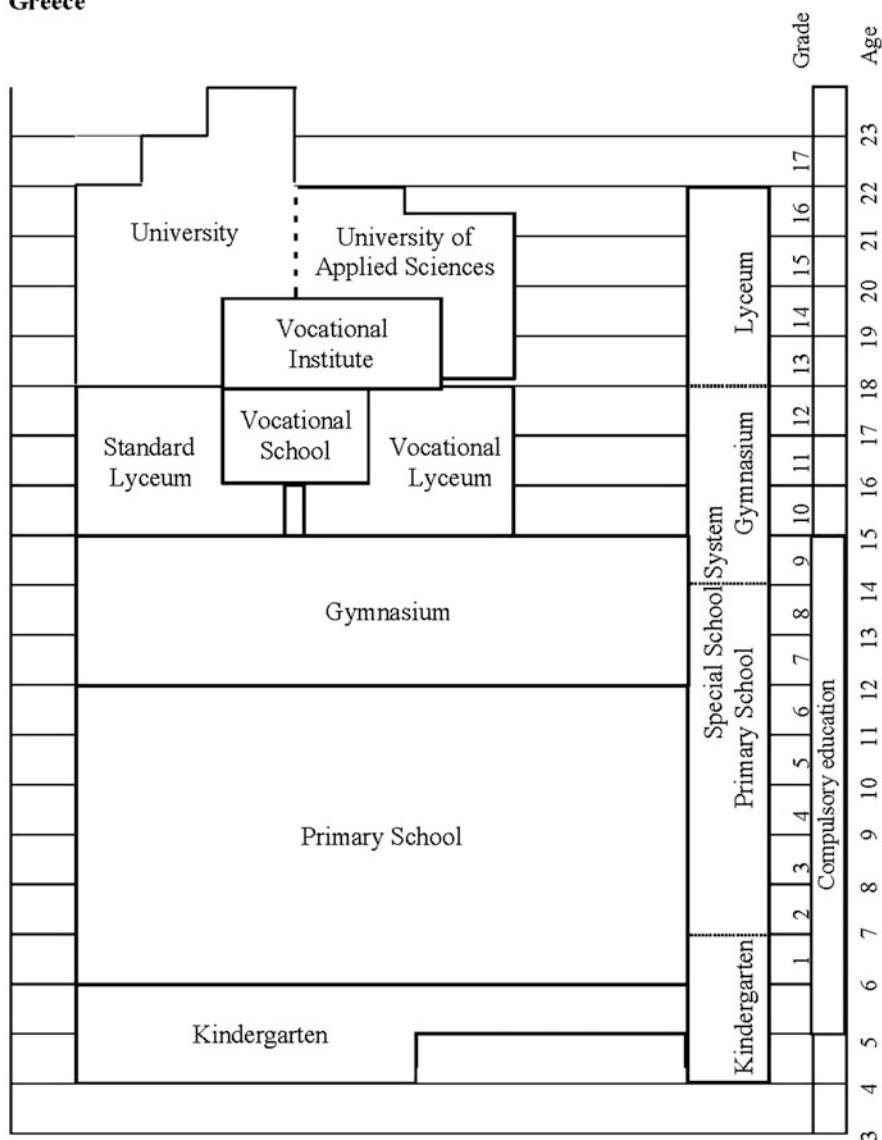
In order to understand the current situation of the Greek school system, it is relevant to explore the educational history following the Second World War. At this time, European countries were trying to adapt the school system to the new economic, political, and social circumstances. The corresponding reform measures cover organizational (e.g., comprehensive school), contextual (e.g., curriculum reviews), and didactic aspects (e.g., differentiation measures) (Hamann 1986).

The optimistic attitude of the educational policy of the time was linked to a two-pronged system of aims: On the one hand, it sought to reestablish Europe's fractured economic structure and to drive economic development by training suitable staff for the labor market; on the other hand it sought to use "objective" assessments of achievement – promulgated by the dominating structural-functional educational theory of the time – to contribute to equality of opportunity in education and thus to social fairness.

An important step in Greek educational history in this sense began in the mid-1960s. Since that time, there were three clear educational reforms affecting

P. Xochellis (✉) • A. Kesidou
University of Thessaloniki, Thessaloniki, Greece

Greece



the whole school system. The first of these occurred in 1964 but was almost immediately interrupted by the seven-year military dictatorship (1967–1974). The process was then resumed in the years 1976–1980. The second set of reforms was introduced in the 1980s, particularly in the period 1981–1985; and the third set was

mainly implemented between 1997 and 2002. Although amendments made to the school system after 2004 cannot be ignored, they do not represent a major reform as described above.

Generally speaking, Greek educational policy over the last five decades has been characterized by repeated attempts and measures to adapt the school system to new circumstances. At the heart of all the reforms has been the principle of equal opportunities in education on the one hand and the regulations governing the growing demand for higher education on the other. These intentions were accompanied by a high level of aspiration on the part of Greek families, described in the relevant literature as “educationally promotive” and who play a key role in the upbringing and education of young people (Tsoukalas 1977) and by a characteristic overestimation of the power of schools in the new Greek society.

The main aim of the first of the three reforms mentioned above comprised opening up school education to people from all social classes with efforts taking account of socioeconomic and sociocultural conditions in the education system and at the same time avoiding or rerouting the large flow of students to universities by setting up a second school network, parallel to the general network, with vocational programs. Generally it can be said that the promotion of all and the selection of the best were the main threads of this school reform.

Structurally, compulsory schooling was extended from six to nine years, teachers were free to choose their own teaching materials, and the six-year secondary education was divided into a standard *gymnasium* (lower secondary school) and the *lyceum* (upper secondary school) differentiated into general education and technical-vocational tracks. Furthermore, other substantial changes were made to education that aimed at modifying mother-tongue instruction on the one hand and at strengthening the teaching of natural sciences on the other. Access to tertiary education was to be through a national selection examination at the end of the upper level of secondary education instead of an entrance examination conducted at the universities.

The consensus on questions of educational policy that had existed between the political parties and in public opinion in the period after 1976 eventually broke down at the end of the decade, and fierce criticism began to be directed at the reforms. After the socialist party (PASOK) came to power in the election of 1981, this criticism led to a new package of reforms for the school system (1982–1985), a concept of educational policy that pursued three guidelines: provision of education as concern of the state, equal opportunities for all, and democracy in educational institutions and educational planning. Individual statutory provisions – mainly two framework acts governing general and vocational education on the one hand and higher education on the other – regulated all the important dimensions of the school system from the setting of aims for the various tiers and types of school and questions of the structure, organization, and administration of the school system through to aspects of pupil life and the involvement of social stakeholders in school life.

In the center of the reforms implemented between 1997 and 2002 was the demand to unify the upper level of secondary education and to settle the question of access to university; but other aspects of schooling were also regulated.

The standard lyceum (comprehensive school) was introduced to replace the three different types of lyceum which had hitherto existed for pupils in the upper secondary school (i.e., the general education lyceum, the technical-vocational lyceum, and the polyvalent lyceum). Access to tertiary education (technical colleges and universities) was to be through the lyceum school leaving certificate. The legislation contained other matters such as the way in which new teachers would be recruited; the evaluation of teachers and schools; the all-day school; the so-called uniform curricular framework, covering the whole period of compulsory schooling; remedial courses for weaker pupils; the founding of the Greek open university and a national center to plan and coordinate teacher training, the setting up of regional administration centers to localize centrally structured school administration; and the founding of second-chance education facilities. The mid-1990s also witnessed the founding of the National Education Council, a consultative body within the Ministry of Education to advise on education planning. This period also saw the unification of the two sectors of higher education (universities and polytechnics).

Following the change of government in 2004 when the conservative ND party came to power, other changes to the school system were made. This mainly included the renewed external differentiation within the upper level of secondary education in two types of school – the general education school and the vocational lyceum, the expansion of compulsory schooling from nine to ten years by including one year of preschool and renewed quality assurance efforts at all levels of the education system. Changes at tertiary level included the establishment of an international university and the attempt to rationalize some of the previous statutory regulations governing universities that had proved to be problematic. The latter met with substantial resistance from students and opposition parties, a dispute that still dominates the field today.

If we were to characterize the reforms carried out over the last 50 years, four key aspects come to light: (a) Most reforms focus on the secondary sector, the “problem child” of the Greek education system. (b) The standard lyceum (comprehensive school) has also been introduced to the upper level of secondary education where policy makers are hoping for greater equality of opportunity; although major steps have been taken in this direction in all education reforms, they have not been fully capable of overcoming the socioeconomic, geographic, and most of all cultural disparities that still exist in the school system. (c) The way of transition to higher education has been modified many times in this period. However, access to university study is still regulated by a selection examination and *numerus clausus* on top of the leaving certificate from the upper level of secondary education. In contrast, university study via second-chance education remains an unfulfilled need. (d) Internal school reform measures focus on changes in curricula, textbooks, and assessment procedures which, however, have proven to be insufficient. (e) Teacher training for preschool and primary school sectors was included into the university sector – a measure that has contributed to the improvement of the training and to the increase in the social prestige of primary school teachers. Nonetheless, this does not necessarily answer the question of the effectiveness of the new procedure of teacher training.

20.2 Fundamentals, Organization, and Governance of the Education System

Discussions on the current principles, aims, and strategies in the Greek education system have given rise to the following points: Lifelong learning shall be promoted, with the aim to convey knowledge throughout a person's whole life; to update professional skills during a working career; to combat illiteracy and digital illiteracy, unemployment, and social exclusion; and to promote social integration. Lifelong learning affects each and every citizen regardless of their formal educational qualifications, social and economic situation, ethnic origin, religion, and place of residence. But Greece is low down the table in the field of lifelong learning.

Furthermore, general educational goals include equality of opportunity, combating social exclusion, and integration and reintegration in society. The Ministry of Education has recently emphasized that although the education system is closely tied to the economy and employment, there are also close ties to society at large in the sense that education can foster social mobility, the redistribution of wealth, and social cohesion. The focus is clearly on a people-focused education and upbringing that takes account of sensitive social groups (minorities, migrants, returning expats, Roma, and the disabled). Within this framework, the Ministry recently promoted "zones of educational priority" with the aim of offering all children the same opportunities and possibilities, in other words, a program of positive action and additional funding for geographically, socially, and economically disadvantaged schools.

As far as the individual levels of school are concerned, the following aims have gained prominence in the last few years. The inclusion of the one-year attendance at kindergarten in general compulsory schooling which is thus extended to ten from nine years can be seen in the context of the need to ensure a longer general education for everyone and to better prepare small children for the demands of the subsequent primary level of schooling. As before, the full-day school needs to be more widespread and strengthened across preschool and primary school levels, and the shift system needs to be abolished with the corresponding investment. The latter is a protracted problem in Greek education that has also been one of the causes for preventing the spread of full-day schools.

As far as the general compulsory schooling is concerned, the promotion of interdisciplinary learning and networked thinking has been a key focus of the framework or cross-curriculum. Appropriate teaching-learning materials connecting the individual subjects and promoting a broader-based learning which involve learners in practical processes aim to support cross-curriculum methods. Discussions on curriculum revision which aims to increase educational processes are still ongoing. This is justified by the rather mediocre performance of Greek pupils in PISA studies since 2000. Despite the fact that the PISA studies have hardly had any influence on the education debate in Greece over the last ten years, the current suggestion is for a need to improve the quality and effectiveness of the education system.

Furthermore, the new generation is not only to be seen as the perpetuator of the diachronic Greek culture, helping to retain its peculiarity, but is also to develop an openness for global challenges and European values. Even the cross-curriculum approach aims to strengthen the cultural and linguistic identity. However, this is to run parallel with the development of a European consciousness and the introduction of a cross-cultural dimension within the multicultural society. This is set to help develop multi-linguism in the country, with foreign language teaching currently being given greater attention in education.

According to Article 16 of the Constitution (revised in 2001), education is fundamentally the responsibility of the state and aims to provide moral, spiritual, vocational, and physical training, to develop national and religious identity and to develop free and responsible citizens. The latest framework curriculum targets the following aims: to convey a general education, to ensure equality of opportunity at school, to cultivate the skills and interests of pupils, to provide a connection to the labor market, to strengthen the cultural and linguistic identity within a multicultural society, to develop an understanding of human rights and an awareness of environmental protection, and to prepare pupils to use information and communication technologies. The Education Act of 1985 (Law 1566) on the Structure and Function of Primary and Secondary Education still forms the framework law for education today. Together with a range of further education acts, most of which were passed after 1985, this still regulates school life in Greece.

The Greek education system tends to be more uniform than differentiated. Uniformity is seen as a means to achieve the targeted equality of opportunity. One form of internal differentiation in the Greek school system can be seen in English lessons at gymnasium level, which is offered at two levels (beginner and advanced) in many schools based on pupil ability. In addition, the cross-curriculum approach is intended to create the conditions for an increased use of projects and group work in lessons. External differentiation only comes to the fore in the general lyceum where the school program is partly made up of general education core subjects and partly of specialization subjects. Pupils can choose among three tracks – academic, natural, and technological sciences. On top of this, there are a limited number of lessons dedicated to electives. This remains the situation even following the revision of the upper level of secondary education pursuant to the new education law (4186/2013). In the last few years, additional support has been offered at the upper level of secondary education. This includes remedial courses for slower-learning pupils within public school programs. In addition, supportive lessons are also being provided in the numerous and widespread private Frontistiria or revision courses. This is an attempt by pupils and parents to use their private funds to make up for the shortages in the public school system. It is however questionable whether the fundamental aims of equality of opportunity, democracy, and state education can be achieved through this.

The school system is administered at three levels. The upper, central level is formed by the various departments of the Ministry of Education, each responsible for a particular level or subject area within the education system. The second level consists of the administrative authorities in the country's prefectures or districts

(regional education authorities). Finally, at the local level, administration is in the hands of the head teachers and the faculties of teachers. The heads of the local education authorities and the head teachers are appointed on four-year contracts by administrative commissions functioning at the district level or by the Ministry on the basis of an application procedure. Law 2817/2000 introduced a fourth level of school administration at regional level – between the central government and the districts – which is supposed to contribute toward decentralizing the previously centralized administration of the school system. To date, however, this level has proven to be yet another level in the pyramid of school administration used to ease the communication of Ministry instructions to the lower levels. In other words, the regional level has not been granted any substantial authority by the Ministry. Instead, it has sometimes generated even more problems due to overlapping responsibilities.

For many years, the Pedagogical Institute was responsible for constructing the curricula across all types and tiers of school. This was a relatively independent office within the Ministry of Education that exercised a consultative role in questions of educational planning (such as curricula, textbooks, timetables, and assessments of performance). However, the financial crisis that hit Greece in 2010 led to the closure of the institute and other institutions within the Ministry. The responsibilities of the former Pedagogical Institute were taken over by the newly founded Institute for Educational Policy, which, under the auspices of the Ministry, focuses on academic research relating to questions of the planning and application of educational policy. It also has a role to play in evaluating school structures, schoolwork, and teachers.

Because the Constitution stipulates that education is the exclusive responsibility of the state, the education system is financed from the state budget. The communities are responsible only for the upkeep of school buildings. They are obliged, however, to make funds available for the operation of *crèches* and day nurseries. The costs of school textbooks and of reference books provided to university students are also covered by the state. Since 1997, a support program – Education and Vocational Training – has been focusing on a number of priorities. This includes promoting equality of opportunity in accessing the labor market especially for those at risk of being socially excluded, improving education and vocational training within the field of lifelong learning, improving the infrastructure and equipment in educational facilities, etc. This program will continue up to 2013 under the heading Education and Lifelong Learning with the prospect of being extended and aims at modernizing the education system and improving quality across all levels. Eighty-five percent of program funds are sourced from the EU, 15 % from national resources.

Private schools are under the overall supervision of the Ministry and must pursue the same educational objectives and implement the same curriculum as the state schools. Given the approval of the Ministry, it is also possible to add other subjects to the curriculum of certain schools. Private education is attended by some 6–7 % of an age cohort and is available at all levels of the system except the tertiary level; the Constitution does not permit the foundation of private institutions of tertiary

education. For some years now, the Ministry of Education has been intending to permit the establishment of private universities once the Constitution has been amended. First and foremost, this would affect the centers for free studies – private colleges that cooperate with foreign universities (primarily from the UK) to offer study programs. This prospect has met with severe criticism and resistance on the part of public universities and their students who see private colleges as fully unsuitable for such support. According to Laws 4093/2012 and 4186/2013, these colleges are being assigned to the postsecondary, non-tertiary sector of education.

The levels of administration described above are restricted to complying with prescribed regulations and have no authority as far as the academic and educational aspects of upbringing and education in schools are concerned. The relevant consultative function is carried out by the school councils who are also appointed for a term of four years and who only recently have been granted the authority to evaluate teachers and schools (Presidential Decree 152/2013). There has been no system of evaluating teachers and schools in Greece for the last 30 years. The Education Act (2002) contains specific regulations for evaluating schoolwork, assigning everyone involved in the education process a specific role. The intention behind this is to contribute to evaluating the quality of education, a main aim of educational policy continually being emphasized by the Ministry. However, these regulations have met with resistance from teachers' unions and still have not been implemented. The discussion has been reopened in the last few years with a self-evaluation in all schools taking place from 2013 to 2014 and an evaluation of teachers and school administrative staff.

Since the academic year 1984/1985, preschool and primary school teachers have received their initial training in a four-year single-phase course of university-level studies. Training is made up of three areas: educational science, the subjects they will teach in school, and teaching practice. Initial training for teachers in the technical-vocational sector of the school system is somewhat similar but is structured in two phases. General education teachers in secondary schools receive their initial training in single-phase courses at university; these courses are almost exclusively oriented toward the subjects they will be teaching. A certificate of pedagogical competence was envisaged by the Education Act 2525/1997 but was never implemented.

In-service training takes place at Regional Continuing Training Centres. The current trend is in-service training courses of short duration restricted to introductory courses for teachers who have just been appointed. In-service training is not available right across the system; at present it is confined to primary and kindergarten teachers. Teachers attend the training courses at university, with official leave from their posts and with no loss of salary, for a period of two years. This opportunity has not yet been extended to secondary school teachers. However, in principle all teachers have the opportunity to do a course of further study at university. There is no systematic training for school administrative staff in education prior to taking up their responsibilities. Instead, they are offered individual in-service training courses.

20.3 Overview of the Structure of the Education System

The current education system consists of the primary sector (including preschool and primary schools proper); the first general education stage of secondary school (gymnasium); the second stage of secondary school, with general and vocational options (general lyceum and technical-vocational schools); and the tertiary sector (universities and technical colleges). The primary stage (age 5–12) and the first stage of secondary school (12–15) comprise the ten years of mandatory schooling for all children. This stage is followed by the upper level of secondary education, lasting two or three years. There is no selection process regulating the child's movement up to the next stage in his or her education until the point of entry to tertiary education.

The Education Act of 1985 (Law 1566) defined preschool education as part of the primary stage, lasting two years and provided to children between the ages of four and six. Since 2007/2008, the second year of preschool is compulsory. This takes place in kindergartens (*nipiagogeia*). Most of these are run by the state, but some are private. Attendance at the former is free, while private kindergartens charge fees. Children are admitted to kindergartens if their fourth birthday falls before the end of the year of their registration. The law states that the kindergarten to be attended shall be determined by the address of the child's family, which means that children attend a kindergarten in the same district as the school where they will subsequently be enrolled. The school year 1997/1998 saw the introduction of the all-day kindergarten, operating an extended timetable and allowing children to engage in creative activities for at least 8 h each day. In the first year, these all-day kindergartens were introduced only as a pilot program, their number not exceeding 160, but two years later, by the school year 1999/2000, they were no fewer than 700. In the school year 2004/2005, there were 2,191 of such kindergartens. The objective is that all kindergartens should eventually operate on an all-day basis. Their introduction should be seen as a boost to the system of preschool education, making a valuable contribution to the integrated preparation of the child for primary school, eliminating educational and social inequalities, and providing much-appreciated relief for working parents.

Since 2003, the cross-curriculum approach also applies to preschool education. Learning takes place through research-like activities and project work. The aim is to prepare small children for the information society in which they will live. It is planned to develop activities in languages, mathematics, environmental studies, expression and creativity, and information technology (IT). These are not to be seen as individual objects of learning but as a broad process of socialization of small children. The achievement orientation of Greek schooling can even be seen at preschool level where we can find the basis of first measures of achievement.

The main problem of the preschool sector is the shortage of kindergarten places. A further problem is the shortage of rooms for kindergartens, especially for those which work together with primary school under one roof. It is often the situation that there is hardly any space for creative work and no, or only very modest, playground space. In addition, the benefits of the occasional coexistence of kindergartens and schools in terms of the flexible transition from the former to the latter are not being exploited.

The six years of primary school (*dimotiko scholeio*) begins when children turn six. The school to be attended is determined by the home address of the child's family. As a rule, primary schools operate on a half-day timetable, but since 1999, all-day schools have been introduced, in parallel to the development described above in the preschool sector. There are currently 28 pilot all-day schools and a large number of schools operating an extended timetable, and these are also usually described as all-day schools.

The lessons taught in primary school are religion, modern Greek, mathematics, history, environmental studies, geography, physics, social and community studies, aesthetics, sport, a foreign language (English), a second foreign language (French or German in Years 5 and 6), and the so-called "flexible zone" for interdisciplinary studies. All lessons are mandatory and, in most schools, are taught by the same teacher; the only exceptions are English, sport, and music, which are taught by specialist teachers. Since 2006/2007, new textbooks have been introduced that support the interdisciplinary philosophy called for. In the first two years of primary school, pupils have 25 h of classes, and in the last four years, 30 h. In the first years of school, pupil evaluation takes the form of report cards or performance groups (A, B, C, or D), and in the final two years, on a numerical scale. Children automatically advance to the next school year, provided their attendance has been satisfactory and their teacher confirms that they have mastered the fundamentals of the year's curriculum. At the end of each school year, children receive a certificate, while at the end of Year 6, they are given a primary school leaving certificate (*apolitirio dimotikou*), which assures their entry (without any selection procedure) into the first year of the lower level of secondary education.

A number of problems have been identified in the Greek primary school system: the problem of ensuring the quality of education in overcrowded schools in the larger cities; the problems of small rural schools, with one to four classes, which are unable to afford sophisticated teaching aids; and the problem of children in small villages who have to travel large distances every day to the nearest primary school. Other areas of controversy are the use of just one textbook for each subject in every school in the country, a system which many regard as inhibiting creativity and reducing the motivation of both teacher and pupil, the inadequate support for pupils with learning difficulties, and the absence of a system to complement the automatic advancement of children into the next year, whereby the teacher would prepare a detailed report on the pupil's learning potential and weaknesses for the guidance of his or her successor. At present, emphasis is being placed on environmental and health education, on implementing cultural programs and on learning foreign languages.

Secondary general education takes place in the grammar school (*gymnasio*) and general lyceum (*lykeio*). The three-year grades of the *gymnasio* form the lower level of secondary education and, at the same time, the final stage of the ten years of compulsory schooling. The *gymnasio* is open to all children who have successfully completed primary school and is designed to meet the needs of children aged 12–15, offering all children a standard, undifferentiated program of studies. In addition to the schools offering a half-day timetable, there are also a number of evening grammar schools which also offer a three-year curriculum. There are also a small number of religious, art, sport, and music schools.

As in the primary school, here too there is a basic curriculum which consists of the following: religion, Ancient Greek language and literature, Modern Greek language and literature, history, civics and social science, foreign languages (English plus French or German), mathematics, physics, chemistry, biology, sport, aesthetics, and domestic science, information technology, geography, and school and vocational guidance. As in primary school, the teaching is based on just one textbook for each subject. New textbooks have recently been provided. The school year is divided into trimesters with 35 h of instruction provided per week. Grades are awarded on a point scale. There are oral and written tests during the course of the trimesters, with full examinations at the end of the year. The same procedure is applied in the granting of the gymnasium leaving certificate (*apolitirio gymnasiou*), which grants the pupil free access, i.e., with no selection process, to the upper level of secondary education.

Some of the most frequently mentioned problems associated with the gymnasium level are as follows: The transition from primary school to gymnasium does not appear to be as smooth as it should be; too many pupils are not properly prepared for the demands of the next level. Despite this, in the *gymnasio* too, the majority of pupils advance to the next year, which means that a large number of pupils proceed despite significant learning difficulties and poor marks. Other causes for concern are the poor motivation of teachers, teacher shortages leading to unfilled posts in some schools and districts, and the need for a curriculum allowing for at least a degree of differentiation. A further point for discussion relates to the fact that the number of lessons allocated to Ancient Greek language and literature has risen over the last few years at the expense of Modern Greek language and literature. This has been criticized as a glorification of the past. In addition, it has also been said that pupils find it difficult to follow lessons in Ancient Greek, which most find as dry and meaningless.

Over the last few years, educational policy relating to special school has concentrated on developing suitable structures and services to ease the inclusion of pupils with handicaps and special education needs into general education schools. The group of pupils with special education needs includes children with attention-deficit hyperactivity disorder (ADHD) as well as children with special talents and gifts. The aim is to provide those in need of support across all ages with state-run education at all levels free of charge (this also includes lifelong learning and vocational education). Such pupils can attend (a) normal classes, which, depending on the pupil's profile, may be supported by a special school teacher, (b) special classes within general education and vocational schools, and (c) special schools, and (d) in exceptional cases, lessons may also take place at home. Special education services include differential diagnosis, evaluation, and systematic educational intervention through the development of individual materials and programs that take account of the special needs of the pupils. Depending on the case, these can be joined by the center for differential diagnosis and support, school councils for special and general education, and special education teachers and regular teachers in general education classes.

The general lyceum (*geniko lykeio*) offers a general upper level of secondary education, while the vocational lyceum (*epagelmatiko lykeio* – EPAL) and the

vocational school (*epagelmatiki scholi* – EPAS) offer pupils of the same age a curriculum with a more technical and vocational orientation to the upper level of secondary education. The general lyceum is the product of the 1997 reforms, which did away with the previous types of secondary school. There are just a small number of religious, art, and music schools. Pupils, aged 15–18, spend three years at the lyceum, which is run on a half-day basis. Young people (aged 18–25) who are already in employment and who wish to attend the evening lyceums spend four years completing the curriculum.

Although the lyceum continues the general education of its pupils, unlike the *gymnasio*, it also provides for a degree of specialization. The first year functions as a basic orientation level, with a general curriculum and just one elective subject. But in the second and third years, pupils divide their time between core subjects (providing general knowledge) and specialist subjects. For the purposes of their specialist lessons, the pupils register in one of three streams: (a) theoretical knowledge, (b) natural science, and (c) technology. A limited number of hours are also dedicated to elective subjects.

The general lyceum caters for a high level of general knowledge teaching. In addition, it also aims to develop skills such as personal initiative, creativity, and critical expression. The general lyceum provides pupils with knowledge and skills required at the next level of education, while at the same time, promoting skills which, following a specialization or vocational training, ease their access to the labor market.

The reform of the upper level of secondary education that took place in the wake of the Education Act 2525/1997 affected curricula and textbooks. New subjects were introduced and new textbooks published. In the first year, general subjects are taught across 32 lessons per week; on top of this, pupils have one elective (two lessons). The second year comprises 25 lessons of general education subjects. Specialist subjects are divided into “obligatory options” (seven or eight lessons) and electives (four lessons). The same division also applies for the third year, whereby 17 lessons are allocated to general subjects, twelve to obligatory specialist subjects, and two to an elective. The general subjects include religion, Ancient Greek language and literature, Modern Greek language and literature, history, mathematics, physics, chemistry, biology, the first foreign language, and sport.

Upon successful completion of the lyceum, pupils are awarded the standard lyceum leaving certificate which entitles them, in principle, to enter university. This entitlement is based on the pupil’s performance over the course of the year, his or her marks in the end-of-year exams of both the second and third years of the lyceum, and achievement in national examinations in six subjects at the end of the third year. Courses are grouped into five academic areas: (a) humanities, jurisprudence, and social sciences, (b) natural sciences, (c) health sciences, (d) technology, and (e) business management and economics.

The main problems relating to the general lyceum are the pressure on achievement and time and the excessive demands made on both pupils and teachers. Schoolwork is almost entirely oriented to the final examinations, limiting the scope for further activities and creative work. For this reason, there are discussions

on the autonomy of the general lyceum, releasing it from the selection process for higher education. The problems mentioned were partly the reason for a new reform of the upper level of secondary education and the general lyceum due for 2013/2014. The reform, provided for by Education Act 4186/2013, will initially affect the first year and should be fully developed by 2016.

The vocational lyceum and the vocational school arose as a result of Education Act 3475/2006, which revised vocational education at secondary school level. All pupils who have a school leaving certificate from the gymnasium are entitled to enroll in a vocational lyceum. This lasts three years and provides a combination of general and specialized technical-vocational training to ease transition to the world of work for pupils. The leaving certificate from the vocational lyceum is equivalent to that of the general lyceum. Graduates can either acquire a license to practice a trade, apply to an institute for vocational education (IEK), or take entrance examinations to apply to a place at university or technical college (TEI).

In contrast, the curriculum of the vocational schools is only focused on vocational specializations and addresses all pupils who have completed the first year of the general or the vocational lyceum. Having completed their two years, vocational school graduates can either acquire a license to practice a trade or enroll in the second year of the vocational lyceum or an institute for vocational education.

Vocational education at secondary school level is faced with a series of problems, primarily with regard to delays in compiling curricula and in staffing. In 2006/2007, 75.3 % of pupils attended a general lyceum, while 24.7 % attended a vocational lyceum, which manifests the marginal role played by vocational education in Greece. In this respect, the vocational lyceum is to be revised considerably in line with Law 4186/2013. This is to be seen as an attempt to link vocational education better to the labor market, production, and economic growth and to adapt it better to wider European circumstances. The law envisages curricula, for example, that are focused on the results of learning and on vocational frameworks which define knowledge and skills for individual professions. In contrast, the same law also envisages the closure of vocational schools by 2015. Following internal examinations, vocational lyceum graduates are to receive the leaving certificate, equivalent to the leaving certificate from the general lyceum, and the Level 3 Certificate of Specialization.

Law 4186/2013 envisages the establishment of Schools for Vocational Education (*Scholes Epagelmatikis Katartisis* – SEK) that addresses graduates from the lower level of secondary education (*gymnasio*). These offer programmes of three years leading to the award of the Level 3 Certificate of Specialization. Furthermore, the vocational lyceum offers an additional apprentice year on top of the 3 school years which is a form of dual training whereby all apprentices are trained not only in school but mainly also at work. The one-year programme requires students to have completed the vocational lyceum and examinations lead to Level 4 Certificate of Specialization.

As provided for by Law 4186/2013, institutes of vocational education (*Instituta Epagelmatikis Katartisis* – IEK) are nonformal facilities that offer postsecondary,

nonuniversity vocational education in mainly state-run, but also private, schools. Students are required to have passed the upper level of secondary education or SEK. Every IEK offers a selection of programs and a number of various specializations. Courses are directly focused on the labor market, and attempts are being made to constantly adapt the specializations offered to the changing needs of the labor market. If they pass the course, trainees receive a diploma of vocational education which enables students to take part in centrally organized national examinations for the Level 4 Diploma of Specialization, allowing them to practice their chosen profession. The National Organization for Certification and Professional Orientation, founded in 2010, is responsible for the examinations and awarding diplomas.

Higher education is available at universities (*Anotata Ekpaideftika Idrimata* – AEI) and technical colleges (*Technologika Ekpaideftika Idrimata* – TEI). A degree course at university may last 8, 10, or 12 semesters, depending on the course, and at technical college, seven to eight semesters. Universities and technical colleges are open to school leavers who have secured the general or vocational lyceum school leaving certificate. The former distinction between the highest level of education and the higher level of education no longer exists because both parts now make up the two elements (university and technical college) of tertiary education. While universities are focused on teaching and research, technical colleges are more practical primarily aligned toward applied research. In 2007, a new framework law on higher education (Law 3549/2007) was passed. This does not necessarily reflect a coherent philosophy but intends to resolve problems created by earlier laws. The latest laws (4009/2011 and 4076/2012) are still giving rise to reactions as far as their practical implementation is concerned. Other important developments in recent years in the tertiary sector include the establishment of new universities and technical colleges and the development of new postgraduate studies. With over 400 programs currently on offer at universities, this shows just how high the demand for postgraduate study in Greece is. University courses are offered at three levels. The latest laws reflect the influence of the Bologna Process, but it is worth mentioning that this division has always been an aspect of study at university in Greece.

In 1997, the Open University was founded, making it possible for the first time to study for a degree without actually enrolling in a conventional university course. The Open University offers education and further education of a university standard while allowing the student to study from home. It develops and implements appropriate teaching materials and methods for its courses and also pursues the goal of furthering research in the area of distance learning. At present, demand is brisk for distance learning courses. Law 3369/2005 draws a distinction between lifelong education and lifelong training, with the former referring to the lifelong acquisition of general academic knowledge and of skills and focusing on the holistic development of personality and better access to the labor market. The latter deals with the acquisition of specialist professional knowledge as part of a specific professional activity. Programs offered as part of lifelong education target those who do not have a school leaving certificate from compulsory schooling in

second-chance education (*Scholia Defteris Efkerias* – SDE), providing an opportunity for people to catch up. Lifelong learning for secondary school graduates is provided by Centres for Lifelong Learning (*Kentra Dia Viou Mathisis*); e.g., they offer programs at city level and in parents' schools. Lifelong vocational education is provided by institutes for vocational education and centers for vocational education (*Kentra Epagelmatikis Katartisis* – KEK). The latter address university graduates and can follow on from higher education programs. However, it must be said that the continuing education in Greece is not particularly differentiated. The latest laws (3879/2010 and 4186/2013) aim to change this picture. A National Programme for Lifelong Learning is defined, based on the equal pillars; the first targets vocational education (initial job training and continuing education) and aims to assist career entry and progression, while the second targets general adult education and the corresponding personal development and social cohesion. The National Qualification Framework has also been developed recently by the National Organisation for Qualification Certification and Career Orientation and is to be adapted to meet the European Qualification Framework.

20.4 Developments in the Current School System

The last 50 years have seen a fair share of smaller and greater reforms and reform attempts of varied weightings in Greece. Without doubt, these have led to noteworthy changes and improvement in many areas of the school system. The school system hardly enjoyed any peace during this time; educational reforms were introduced every five to ten years, most of which were not given the time to prove themselves. It is also true that none of the reforms were substantiated by an accompanying academic study. The few evaluations that did take place were mainly aborted within a short period of time or their findings were never published. Generally speaking, all reforms were implemented without being supported by academic research. However, research work tells us that in the absence of sound empirical study, all too often reforms have attempted to cure individual symptoms and have often missed their target. With just a few exceptions, this empirical academic basis was and is a very narrow affair in Greece. Even the results of the PISA studies, used in many evaluations in other countries, have not been used to improve the education system. Many of the reforms we have mentioned were not backed by a broad public consensus; on the contrary, they were quickly and heavily criticized from many quarters. Furthermore, in most cases, either teachers were not sufficiently well prepared and information was poorly disseminated to other stakeholders (such as parents) or these processes were inadequate and piecemeal. There has also been a distinct lack of measures to support the implementation of the reforms, most of which overestimated the value of school, little of which had anything to do with academic findings or with a growing awareness of current problems. In addition, despite the improvements achieved, reforms generally had little effect on areas relating to the internal structure and inner life of the school, in particular the social dimension of school life. Daily reality especially in secondary

schools is still characterized by little internal differentiation, an achievement-focused atmosphere, and teacher-centered methods (Hopf and Xochellis 2003). On balance, developments have not been very positive; although many reforms have brought movement in school education and have certainly achieved one or other solutions, their actual pedagogical contribution to the substance of school life, educational interaction, and content has, however, been minimal.

Overall, the school system is structured horizontally; accordingly there are no examinations at the transition between primary school and the lower level of secondary education and from the latter to the upper level of secondary education. Internal school performance is assessed on the basis of participation in lessons, occasional examinations, and written papers. Examinations that do take place are mainly traditional in form and hardly related to modern tests of achievement. Very few pupils have to repeat a year during compulsory schooling (only 0.67 %), except in cases where attendance has been insufficient. There is however a problem with pupils who leave school, prior to completing compulsory schooling. A survey of the drop-out problem carried out in 2000 by the Pedagogical Institute established a drop-out rate of 6.98 %. Although this rate is perceptibly lower than the corresponding figures for the 1980s, it should not be regarded as insignificant. Young people who have not even acquired a certificate confirming their completion of the nine years of compulsory schooling – the minimum qualification for an “ordinary” job or place on a training scheme – are, at a time of growing unemployment, especially at risk. The survey yielded a number of other important findings. Almost half of school dropouts are children who did not even bother to enroll for the gymnasium. The drop-out rate declines as the pupils advance through the gymnasium, so that the proportion of children who reach the third year of gymnasium but do not go on to secure a leaving certificate is just 0.31 %. A higher percentage of boys drop out of the gymnasium than girls; the drop-out rate in the cities is lower than in rural areas and varies from region to region. It is to be expected that the relevant rates will have dropped. However, it is also possible that due to the growing number of migrant children and children of returning expats in Greek schools who are confronted with language and adaptation problems, the pace of decline is not particularly quick. This problem will have to be observed in future.

A large number of pupils (approx. 8 %) whose families come from other countries currently attend Greek schools. The increasing number of foreign children in schools is a fact today and will probably remain so. Official statistics indicate that there are in total 975,374 (2011) economic immigrants from Eastern Europe, in particular from Albania, Bulgaria, Africa, and the Middle and Far East, who live and work in Greece. The second group consists on the one hand of Greeks returning from Western Europe (Germany, Belgium, Sweden, etc.) or from further afield (e.g., Australia) who also have to face language and adaptation difficulties. On the other hand, there are Greeks belonging to those minorities who, owing to historical circumstances, found themselves living under foreign regimes and who have only recently (mainly in the 1990s) had the chance to return to their mother country. The results of this process is an intercultural mix of pupils in schools which of course makes it more difficult to carry out daily lessons and touches up the

principles of equality of opportunity. This requires effective measures taken by educational policy, starting from equipping schools, including in-service training for teachers through to corresponding changes in curricula and textbooks. Since 1997, the Ministry of Education has been carrying out a support program to integrate pupils from migrant families, in particular to learn Greek, to provide sociopsychological support, and to provide in-service training for teachers. The measures taken by the Greek education authorities take the form of three different kinds of provision: (a) language courses, which offer extra coaching in Greek and in other subjects; (b) reception classes, which are operated in parallel to the ordinary classes using special teaching materials; and (c) intercultural schools – 26 of these have already been set up in Greece. It is striking that in fact only a small percentage of minority children attend the special lessons and take advantage of what they have to offer. There are some which are not attended by any local Greek children, which does tend to weaken their intercultural character, putting the continued existence of these schools in question. Besides the 224 minority schools, a support initiative in 1997 provides educational services for Greek Muslims in the northeast of the country (Thrace). In addition there is the cultural minority of gypsies living in Greece permanently. Drop-out rates for gypsy children are high. Besides a special support program, they are afforded a great deal of attention from educational policy makers. Overall, this intercultural education is a difficult issue and one which will continue to engage the Greek public and above all school educational policy. It is also worth mentioning that expanding full-day schools (at present the vast majority of primary schools) to the lower level of secondary education could help overcome this problem.

Another current issue is the quality assurance in the school system, from primary school through to higher education. This is something that comes to the fore in current discussions. Yet school quality is closely linked with the question of the evaluation of schools and teachers, something which has long been controversial. The repeated draft laws proposed since 1985 have always been resisted by teachers. It is clear, however, in the light of the debate in other European countries and of the practice already to some extent introduced there that no more delays can be tolerated. This is why this question is currently engaging the school administration, teachers, and society at large. As a consequence, Law 4142/2013 established the independent Authority for Quality Assurance in Primary and Secondary Education which is to organize, coordinate, and support the evaluation of school education.

20.5 New Developments

Between 2010 and 2013, a number of noteworthy interventions have taken place in the Greek education system.

At the beginning of 2010, the Ministry announced a new campaign plan under the name New School. In this respect, Law 3848/2010 was passed that focuses on two key issues: on the one hand new selection and appointment procedures for teachers and on the other the evaluation of the whole upbringing and education activities of the school (Xochellis 2011).

Besides the test of competition as a requirement for the requirement of teachers, it also establishes the certificate of pedagogical competence that is to be integrated in university programs. In addition, the law also envisages a two-year probationary period for new teachers. Without doubt, these are positive and necessary provisions. Greece is the only European country in which secondary school teachers – with a few exceptions – can be appointed without having passed any educational training, i.e., they are not professionally prepared for their job.

The new law also stresses the performance of each school unit, from the infrastructure and the resources available through to the atmosphere at school, with the aim of improving the whole educational contribution of the school. This is a specific regulation which makes it difficult to understand the reaction of the teachers' union which has continued to this day. It is not acceptable that an education system should “run blind,” in other words that it cannot gather data on its function, on the use of its existing resources and on its effectiveness.

In the spirit of the new revision plan, an attempt was also made to amend the curricula. The new curriculum claims to be open and flexible, goal oriented, uniform from kindergarten to the lyceum, and pedagogically differentiated, i.e., based on the various paces of learning of the pupils. Focus has been placed on Greek language, mathematics, foreign languages, and computer studies, with the aim of bringing up pupils to be “small academics” and responsible, multilingual citizens. In the course of 2011/2012, the new curriculum was piloted, to be implemented the year after. However, following the change of government in 2012, plans for a new curriculum review were announced. One has to wait until this announcement is executed before any description and evaluation can be offered. The fact remains, however, that despite noteworthy changes, Greek curricula are still characterized by the accumulation of knowledge and the repetition of content. Moreover, this content is generally and traditionally linear with only a few meaningful trends toward an interdisciplinary approach in certain subjects (e.g., in history in the general lyceum).

The latest development concerns the reform of the upper level of secondary education in Greece, i.e., the general and vocational lyceums (Law 4186/2013).

The problem of access to higher education has characterized and bedeviled the Greek school system since the 1930s. The growth in the number of aspirants for university study in the last 50 years not only exemplifies positive aspects (greater educational opportunities and recognizing the principle of the right to education), there is also a negative side to it. This type of selection causes a great deal of social, economic, and psychological pressure on pupils and families as well as raising social and regional barriers. The biggest downside is the fact that the upper level of secondary education has to forfeit quality in education. By and large, schoolwork focuses on the selection examinations that take place at the end of this level to achieve effectiveness which more or less turns this level into a type of preparatory institute for universities with highly undesirable effects: pressure to achieve and a deflated school atmosphere. It is also worth mentioning that in the last few years, it has also been possible to gain access to higher education in certain subjects even with very low school achievement; overall, there has been a decline in achievement

standards. Bearing in mind the criticism mentioned, the latest revision can be seen as an attempt to strengthen the general education nature of the lyceum and the image of all subjects taught in the three years at lyceum. According to the Ministry, this is likely to overcome the problem of pupils spending nearly all of their time preparing for the final examinations at the end of the final year of the lyceum. Furthermore, greater emphasis is to be placed on internal work in all three years which should actually weaken attendance at the private Frontistiria (revision courses). The specific changes envisaged in the guidelines mentioned include: (a) Lesson time spent on general subjects is to be increased after two years at the lyceum; (b) the number of subjects examined as part of national examinations is to be reduced from six to four, with the amount of time for this increased from 14 to 20 lessons; (c) a higher education access grade is to be introduced, made up of marks from the four examination subjects and a mark for achievement across all years in the lyceum; (d) 50 % of questions in internal and external examinations will be drawn from a central database of questions to be set up. These are questions graded by difficulty that are to provide greater objectivity in the examination process; and (e) a National Examination Organization is to be set up to ensure quality and transparency in upper level examinations. Criticism expressed to date on the new guidelines focuses on two points: The lyceum will become even more examination oriented by intensifying schoolwork and taking account of pupil performance across the whole of their stay at school in the higher education selection process; and there are no alternative subjects within the general lyceum for those pupils who do not want to take part in the national examinations.

Law 4186/2013 is attempting to make decisive inroads in vocational education, a step that has been due for decades. The new vocational lyceum is to serve as a substantial alternative path of training, focusing on both a broader general education and on the acquisition of professional skills. The Ministry is hoping for a shift in the mentality of Greek society which favors general secondary education and subsequent university study with most people decrying vocational education. Attempts to connect vocational lyceums better to the labor market can be seen in the following measures: (a) an increase from 19 to 26 in the number of vocational specializations offered at lyceums, (b) the introduction of a voluntary fourth year in which the apprentice year in the form of an internship is to take place, and (c) a review and coordination of curricula with knowledge and skills defined for the various professions. These are important steps especially in view of the economic growth currently targeted in Greece. However, it remains to be seen whether a satisfactory solution can be found for vocational education this time. It also remains to be seen whether the intensification of the schoolwork in the general education lyceums will lead to a redistribution of pupil numbers in favor of vocational lyceums.

As far as the tertiary sector is concerned, two laws (4009/2011; 4076/2012) envisage changes in various areas, such as the participation of nonuniversity persons in the newly founded university Administration Councils (*Symvoulia Dioikisis*) in issues such as planning and funding, changes in the increments and selection criteria for teaching staff, and restricting student participation in faculty

administration boards. Moreover, some unfortunately inadequate attempts have been made to restructure the charter of the tertiary sector. The practical implementation of certain regulations contained in these laws still meets with resistance today.

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With the cooperation of Zsanett Ágnes Bicsák, Tamás Híves und Imre Radácsi.

M. Rébay (✉) • T. Kozma
University of Debrecen, Debrecen, Hungary

21.1 History and Social Parameters of the Education System

The modern Hungarian school system developed during the Austro-Hungarian dual monarchy. General compulsory education was introduced with the passing of the first Education Act in 1868 when elementary (primary) schools were established; the Upper Schools Act from 1883 regulated the secondary school system that up to this point had been by and large confessional. In the 1870s and 1880s, the foundations were laid for a vocational school system along German and Austrian lines. Following the dissolution of the dual monarchy and the development of nation states in Central Europe after the First World War, the network of Hungarian education facilities was extremely patchy. However, the structure of the education system itself was and remained uniform on the territory of the former dual monarchy. In the period between the two world wars, from 1918 to 1939, illiteracy was progressively reduced, and the situation of smaller country schools, the six-year elementary schools – offering the possibility of transferring to the eight-year grammar school, to the secondary modern school, or to the four-year general school – gradually improved. Since 1928, primary schools have been extended to cover eight years; and the forerunners of the vocational secondary schools developed, the practice-oriented upper schools with varying profiles. The school system reflected Hungarian societal structure of the interwar period. In reaction to the selective nature of the middle school system, various movements to promote achievement have developed since the 1930s. These include the development of evening schools and agricultural colleges, but the selective nature of the school system changed only minimally.

Between 1945 and 1948, Hungary, which by then had become part of the Soviet sphere of power and interest in the aftermath of the Second World War, was a parliamentary democracy with changing coalition governments that introduced the democratization of the school system. In 1945, legislation establishing *general schools* came into force. The lower level of this school corresponded to the first four years of the former primary school, while the four-year upper level was formed from the lower four years of the grammar school and the upper four years of the primary school. In 1945–1946, plans were drafted to reorganize the grammar school with new curricula and new textbooks. These considerations – themselves not without their political tensions – targeted the harmonization of the school system and beyond this the harmonization of Hungarian society. As in principle, only specialist teachers were allowed to teach the upper level of the general school, teacher training also had to be restructured. In 1947–1948, the signs of the imminent communist takeover (1949) were also highly visible in educational policy. This led in 1948 to the nationalization of schools, primarily affecting confessional schools which made up the majority of private schools. A further consequence was that the already centralized approval of curricula and textbooks became the sole responsibility of the Ministry of Education whose policies were influenced by the Hungarian Labor Party (the Communist Party). From 1949, the school system was subject to the unreserved political will of the Communist Party, with schools and teachers becoming the mouthpiece of party ideology. From 1949 to 1956, Soviet school curricula were viewed as model curricula, and numerous other elements of the Soviet school

Hungary

												Grade	Age
		Doctoral programme											
		Master										17	23
		University of applied science										16	22
		University										15	21
		Higher vocational training										14	20
												13	19
		Gymnasium										12	18
		Specialist middle school										11	17
		Vocational secondary school										10	16
		Special vocational school										9	15
		Upper level										8	14
		Primary school										7	13
		Lower level										6	12
		Special school										5	11
		Compulsory education										4	10
												3	9
		Kindergarten										2	8
		Crèche										1	7
													6
													5
													4
													3

system were taken on board. Entry to upper levels of schooling was based on political criteria, and Russian had become a mandatory foreign language at school. Following the Hungarian revolution in 1956, control slackened somewhat; for a short period of time, Russian was no longer obligatory in schools. The new School Act passed in 1961 raised the period of compulsory education to ten years, and it became illegal to employ young people under the age of 16. The network of grammar schools was expanded, and the first specialist middle schools were established that for a long time became the preferred form of school for the socially upward mobile.

The demographic development between 1973 and 1976 combined with a temporary increase in the birth rate of 25–30 % brought about a transformation of the school system. The school network was expanded considerably, remaining largely unchanged even after the demographic development had begun to flatten simply because the education expectations of Hungarians had changed. From the end of the 1940s, many rural towns did not want to accept the upper level of the general school, from Years 5 to 8, which meant that in some parts of the country, compulsory schooling had to be enforced. Since the beginning of the 1980s, however, most parents were keen on securing a middle school leaving certificate for their children, and the number of pupils in vocational schools fell drastically, whereas the number of pupils enrolled in specialist middle schools and grammar schools rose.

A milestone in the process of dissolving the *uniform socialistic school system* was set by the School Act of 1985. This law declared schools and other educational facilities for autonomous institutions; at least in terms of the rhetoric of the law and school policy, it was now possible to repel party ideology. Although the law did not bring about a reform of the school system as reformists had been demanding since the 1970s, it did give schools a great deal of leeway to experiment if only based on notions proposed by reformists in the Communist Party. The political winds of change did not however blow in the direction they had pictured; policy was rather determined by the new conservative bourgeois forces that came to power in 1990. The result was the collapse of the superficially uniform school system. Numerous (upper level) grammar schools that were previously four-year schools introduced six-year programmes or were extended to cover eight school years. The number of vocational schools fell because former state-run companies simply withdrew from the vocational education system in the wake of privatization. This increased the network of specialist middle schools which have become the dominating type of secondary school we see today.

21.2 Fundamentals, Organization, and Governance of the Education System

21.2.1 Developments Since the 1990s

The effects of the brief increase in the birth rate hit the tertiary sector in the 1990s. The consequences of this can still be seen in this current decade in terms of financial bottlenecks in higher education and because of student hesitancy to enroll at university. In 2008, more than 80 % of all applicants were enrolled.

The introduction of tuition fees planned by the government was put on ice following a 2008 referendum. Further developments are difficult to forecast. They hinge on the new university programmes, on the general economic situation, the individual use of a university program, and the willingness of the state and parents to finance university study. Besides of the obvious painful effects of school closures and longer journey to school, demographic developments also have their positive side, mainly in the primary and secondary sectors (decline in pupil numbers in primary schools in 2005–2006 to 74 % of the level of 1990–1991). The decline in the birth rate led to a significant improvement in the pupil-teacher ratio; in the secondary sector, bigger and better equipped schools were established that were able to react to the changing demographic situation by expanding their range of programs; finally, the decline in pupil numbers made it possible to extend compulsory education to twelve years.

21.2.2 Goals of Education Policy

Hungary's entry in the European Union in 2004 also steered the country's education policy increasingly towards European goals and responsibilities, with Hungary now taking part in a variety of European programs and projects (e.g., the Lisbon strategy and the Bologna process). The most important educational priorities for the Hungarian government in terms of its education system are (1) the development of skills for lifelong learning, (2) the use of modern information and communication technologies in education, (3) the improvement of foreign language education, (4) promoting the social integration of children from socioeconomically weak families, and (5) the reform of vocational education. Funds from the European Social Fund and other subsidies are available for some of these measures. Poor results in the PISA study across all survey cycles shocked everyone involved in educational politics as well as the Hungarian public. In explanation, the Ministry of Education referred to the shortage of funds and to problems of efficiency. The Europeanization of the Hungarian education system also comprises higher education policy. Back in 1999, Hungary endorsed the reform project to develop a uniform European system of higher education (the Bologna process). In recent years, the goals and regulations of this process have been implemented in law and transferred to institutes of higher education.

21.2.3 Legal Framework

Following the political change, the legal provisions governing Hungary's school system changed considerably. This applied to the substantially amended law on compulsory education and to the University Act and the Vocational Education Act (both 1993). Among other things, these laws determined fundamental principles such as academic freedom, free compulsory education, and the institutional autonomy and competence of various players in the education system. A new University Act came into force in 2005 and has since been amended several times.

21.2.4 Governance

In respect of the scope of decentralization of the education systems, Hungary differs fundamentally from the educational reform processes in other central and eastern European countries. In Hungary, for example, local governments are responsible for the schooling of children in their districts. To this end, they have to build and maintain schools themselves or conclude agreements with alternative providers (e.g., religious denominations, foundations, private schools). Decentralization has historic roots that go back to the Education Act of 1868. Policy and educational decisions are met at four levels – national, regional, local, and institutional – but communication between players is not always free of conflict. Decision-making competence largely lies with those involved at local and institutional level. The national level, which determines the overall framework of the education system, has again been strengthened in recent years – partly as a consequence of the country's entry in the EU. To be able to apply for EU funds, the government has elaborated a National Development Plan which also includes the education system and defines goals for improving the infrastructure in preschool and compulsory school sectors. Since the mid-1990s, various governments have been trying to restore the uniform compulsory school system in Hungary. This has met with certain difficulty since schools are established and maintained by local administrative bodies. Although the currently valid Education Act does not provide for a structure of compulsory schooling, it does allocate responsibility for determining content requirements (educational objectives and content) to the ministry for education. Consequently, a National Core Curriculum (NCC) has been passed. This new means of governance came into being following many years of academic groundwork, many political controversies, and public discussion, which still continue today. The NCC determines uniform requirements for the first ten years of school. The last two years of this serve as a preparatory phase for university study. The NCC does not prescribe individual subjects; instead, it has defined ten fields of learning within which minimum requirements for each school year have been laid down. The government has established the NCC as a statutory instrument with parliament deciding on its basic principles. Besides the NCC, framework curricula for individual subjects have been binding for schools since 2000 as have been the schools' concrete curricula based on these that determine guidelines for classwork and that have been passed by the respective maintainers of the school. Thus, maintainers of schools are not only responsible for planning and financing schools; they are also responsible for content, or curricula, which sometimes exceeds their level of expertise.

21.2.5 Financing

The financial resources required to operate the compulsory school system are borne by the maintaining bodies of schools and by the state. Maintaining bodies of primary and middle schools receive allocations of funds on a per capita basis

and for the delivery of special pedagogical activities. This covers roughly 80 % of their costs. The remaining 20 % is complemented by local authorities or other sources. This is a considerable problem, since teacher salaries which are subject to centralized regulation are a significant part of school costs. Teachers are public employees; appointment regulations are governed by the law on public service. School financing is a very controversial issue not least because local authorities are responsible for compulsory general schooling (primary and secondary levels) but not for upper secondary education (vocational schools and upper levels of general schools). Vocational schools are maintained by central government, business enterprises, and local administrative bodies as well as by foundations, churches, and private means. As a rule, these facilities receive financial support from their maintainers and other institutions. Because specialist middle schools and other vocational secondary schools are facilities which cover compulsory education, they are actually part of the compulsory school system and are therefore financed from public funds. Annual budget allocations are partly determined by the National Council for Vocational Education comprising various employer and employee representatives and various ministries. An important source of funds for the vocational education sector is the National Vocational Education Fund into which all companies have to pay mandatory contributions.

21.2.6 Private Education Facilities

Prior to political change, there were only a few private educational institutions in Hungary. All kindergartens and general schools were maintained by the state. Only ten grammar schools and the theological universities were maintained by religious denominations, and before the law governing the pluralization of school maintaining bodies was passed in 1990, only a few more private schools had been established. Since then, however, religious communities try to recover as many of the schools nationalized in 1948 as possible. As this was pledged and permitted by the first freely elected government, long drawn-out negotiations have ensued primarily concerning the retransfer of property rights. Despite the decline in the birth rate, the number of pupils attending confessional schools has risen: between 1992 and 2004, their numbers increased fourfold. Nevertheless, only about 5 % of pupils currently attend a non-state run school. The proportion of pupils attending private grammar schools currently stands at 15.8 % (at as 2006–2007). Confessional and private maintainers of schools play practically no role at all in vocational education; however, 17 % of specialist middle schools – which also covers the vocational education sector – are foundation schools. The conditions for establishing and maintaining private schools are not different to those that apply to state-run and local government schools. Based on agreements concluded with the respective local authorities, private schools receive state subsidies in line with their school numbers. The same also applies to private universities.

21.3 Overview of the Structure of the Education System

21.3.1 Preschool Sector (ISCED 0)

Crèches care for children from at least 20 weeks old to the end of their third year, kindergartens for children from three to six years. Kindergartens prepare children for school and are obligatory for children from the age of five years. Regardless of the differences in their organization and in the content of their pedagogical work, all kindergartens are obliged to provide learning programs (usually mornings). Compulsory education begins at the age of six years, provided the child is deemed mature enough for school. Quite a number of parents, especially more middle-class parents, register their children for school when they are seven years of age. Maintainers of kindergartens include the central government, district authorities, and private bodies; the vast majority of kindergartens are maintained by local authorities. Attendance at kindergartens has declined considerably since 1991 because many local authorities can no longer afford to support them. Instead, the number of private, especially confessional, kindergartens has increased. Given the strong fall in the birth rate, the proportion of kindergarten children has risen, from 73 % in 1990–1991 to 87 % in 2006–2007.

21.3.2 Lower School Education (ISCED 1 and 2A)

The general school consists of two levels each of four school years. The lower level corresponds to the former elementary school (primary school); it is responsible for teaching techniques of writing, reading, and arithmetic and for promoting communication skills. All subjects, except for music, sport, and art, are taught by one or two teachers. Since 2008, there are no more four-year primary schools; general schools usually have eight years, in exceptional cases just six years. Due to the decline in pupil numbers, some schools in small rural districts have had to close, and although journey times have increased, sometimes considerably, the quality of education has generally improved.

The upper level of the general school (lower level of secondary education) comprises Years 5–8. Pupils usually have specialist lessons with specialist teachers, but primary school teachers may also be deployed in Years 5 and 6. In the light of the poor PISA results, particularly in reading skills, this is often a desired choice. Pupils may leave the general school at the end of Year 4 (primary level) or after Year 6 and transfer to a secondary school. Compulsory schooling was extended from ten to twelve years in 1998. Pupils are free to attend the general school and the (specialist) middle school or vocational secondary school.

21.3.3 Middle School Education (ISCED 3)

When pupils are 15, i.e., normally upon completion of Year 8, they attend the middle school (upper level of secondary education). Depending on the requirements

of the respective school, pupils may have to document that they have passed a central uniform entrance test. The upper level of secondary education is selective: depending on their performance in the entrance test, pupils attend either a grammar school or a specialist middle school/vocational secondary school. Grammar schools can cover four, six, or eight school years. Many four-year grammar schools offer a preparatory class with an increased number of lessons for foreign languages and informatics. This achievement-oriented institutional differentiation that had already begun to develop prior to 1990 has accelerated since the political change. The number of eight-year grammar schools is relatively small; most cover four or six school years. In addition, there are connecting schools that link education courses from the grammar school with those of the specialist middle school and the vocational secondary school. The general school leaving certificate concludes the middle school and entitles pupils to study at university. Grammar schools like vocational secondary schools (albeit based on different curricula) prepare pupils for the advanced school leaving certificate. Primarily grammar school graduates enroll in higher education (2007: approximately 50 %).

21.3.4 Special School

The education of children with disabilities takes place in normal schools or in integration classes with special programs or in stand-alone special schools. Pupils with minor disabilities (2003–2004: 5.8 % of pupils) learn in specially assisted schools or in special classes in normal schools; the proportion of Roma children among them is very high (estimated 50–60 %). This social, cultural, and not least economical segregation has been severely criticized for a number of years. Physically disabled children are being taught increasingly in integration classes. Severely or multiple disabled children are either cared for in special facilities or within the family.

21.3.5 Vocational Education (ISCED 4 and 5)

After 1990, the system of vocational education in Hungary was subject to considerable change. Independent or company-tied vocational schools were dissolved or associated with vocational middle schools. This helped establish centers of vocational education which, in addition to housing various general secondary and vocational schools, also have well-equipped and adequately financed training workshops and offer training courses of differing length and scheduling. This also includes the advanced school leaving certificate and apprenticeship certificates. In some regions, these institutions also have grammar school departments. Recently, a higher vocational qualification can be acquired in some professions. This includes postsecondary school courses for holders of the advanced school leaving certificate (e.g., higher technical qualifications), which many students take up before commencing university study. Thanks to this diversification, these school centers are

looking to counter the decline in pupil numbers. The Hungarian vocational education system comprises courses at the upper level of secondary education and the lower level of the tertiary sector. The higher vocational program mentioned above is a transitional form of education between traditional secondary school and tertiary training courses that appeal to upper secondary school pupils as well as university students. Although the Hungarian university policy favors these short two- to two-and-a-half-year courses, demand for them is relatively low. A larger proportion of vocational training in Hungary takes place outside of the education system in the form of induction programs at work and in-company and industry-wide training and development.

21.3.6 Tertiary Education (ISCED 5 and 6)

Students need the advanced school leaving certificate to enroll at university. Enrolments are managed centrally. Conditions for admitting students have changed many times in recent years and are currently subject to criticism. The higher education system comprises universities with their strong academic focus and universities of applied sciences with a more practical orientation. According to the law governing higher education, a university has to offer faculties with at least two different academic disciplines. Since 2000, former one-discipline universities in a region (e.g., medicine, engineering sciences) have become integrated institutions with a uniform budget and management. Universities of applied sciences have become integrated in larger facilities as a special faculty.

Until 2006–2007, university degrees were usually acquired after ten semesters; students at universities of applied sciences graduated after eight semesters. The structure of programs was converted in line with the Bologna process in 2005 and applied to both forms of higher education. Prior to the reform, there were only a few consecutive courses, primarily in the field of economics. The new structure allows students to graduate with a bachelor degree after six semesters regardless of the higher education institution. Enrolment in a master's program requires students to reapply for a place at university. Acceptance criteria, based on a percentage rate of the total number of students, were defined late and led to a great deal of uncertainty. A master's degree can be obtained after two semesters' further study. Students aspiring to a research post or an academic career can continue their studies, as before, in a three-year doctoral programme. The Hungarian National Accreditation Committee decides on whether universities and universities of applied sciences are entitled to offer specific courses. In a trend discernible to date, universities seem to be primarily focused on seeking permission to offer master and doctoral programmes; it is still too early to predict what the consequence of this might entail. In the light of demographic change and restricted financial opportunities, the higher education landscape will likely consolidate and be restructured in the not too distant future. Some disciplines have been removed from conversion into the two-level system, including medical disciplines, pharmacy, law, architecture, and arts subjects.

Teachers at kindergartens and general schools need to have graduated from a university of applied sciences, while teachers at middle schools (grammar schools and vocational middle schools) require a university degree. Since the introduction of the new higher education system, teachers at the upper level of general secondary education are also trained at university. In fact, all teacher training for the whole secondary level is now university based. Future teachers study two subjects: one from the beginning of their course and the second from the third semester. At bachelor level, students take courses in education and psychology. Both subjects are continued into the master's phase which also includes a six-month teaching practice. Once students have graduated with a master's degree, they can take their professional teaching examination. The training of teachers at lower levels of schooling and at kindergartens is still conducted within the scope of a bachelor's degree at universities of applied sciences. In-service training of teachers has been strongly differentiated since the 1990s and is subject to market economics.

21.3.7 Adult Education

According to the EU's Lisbon strategy, participation in adult education programs is targeted at 12.5 % for 2010. The rate currently stands at 5 % in Hungary (2008). While initial vocational training expanded in the wake of political reform, adult learning – especially in the age group 35 and over – is very low.

21.4 Developments in the Current School System

21.4.1 Transfer Between School Years

The differentiated and selective lower level of secondary education offers three various transfer options from the general school to the middle school: pupils can change to the grammar school after Year 4, Year 6, or Year 8. The transfer to an eight- or six-year grammar school requires pupils to pass an entrance test.

With the exception of art disciplines, students no longer have to pass a university entrance examination. University entrance is achievement based and depends on scholarly achievement in the last two years of school and on the results of the advanced school leaving certificate. Obligatory courses for the advanced school leaving certificate are Hungarian, mathematics, history, a foreign language, and an elective. This was reformed in 2005, with pupils now being assessed based on central, uniform criteria. The approach to assessment was reformed and is now primarily skill oriented. In the examination for the advanced school leaving certificate, pupils can choose between two levels of performance which are distinguished by the number of points that can be attained. The upper level examination is conducted by external teachers. Students can gain additional points by documenting additional achievement (e.g., language certificates, results of competitions).

As acceptance to university does not prescribe the upper level examination (with the exception of foreign languages), increasingly fewer pupils are choosing to be examined at this upper level (6 % in 2008). In the light of this, critical observers are afraid that the quality of the examination and, in the longer run, the level of achievement in middle schools will drop.

21.4.2 The Schools' Assessment of Achievement

Since 2005, pupils in the first four school years have been assessed on the basis of written progress reports. Normally, a pupil can only repeat a school year given the consent of the parents.

21.4.3 The Integration of Children from Ethnic Minorities

Hungary provides special education facilities, kindergartens, general schools, and middle schools for children from ethnic minorities (German, Croatian, Roma, Romanians, Slavs, Slovenians, and Serbs). The Education Act of 1993 obliges districts to set up minority groups and school classes if petitioned by parents of at least eight children. The number of minority facilities and the number of children and teachers in these facilities has increased considerably since the 1990s. This increase is largely attributable to educational facilities and programmes for the German minority.

One of the central challenges facing Hungarian education politics since the mid-1990s has been minimizing inequality of opportunity and promoting social integration in schools. The free choice of school in Hungary has led to much more socially cohesive schools and classes than in other countries; albeit, pupil achievement is largely determined by school achievement and social status of their parents. Unfortunately, this is particularly true for children of Roma, the largest minority group in Hungary. The central government provides special funds to the school education of Roma children.

Seen internationally, the number of pupils from immigrant families is very low: most pupils who are not Hungarian come from neighboring countries which usually speak Hungarian as their first language. A special group of immigrants are the Chinese (roughly between 10,000 and 15,000), most of whom live in Budapest. Generally, Chinese parents prefer Hungarian schools. Since 2004–2005, there is also a bilingual Hungarian-Chinese general school.

21.5 New Developments

Since 2008, a number of significant changes have taken place in the Hungarian education system, both in the public school system and in the university system. These are highlighted briefly below.

In 2011, Act CXC on National Public Education was passed which included the following main points:

1. Because of the larger number of pupils not completing school and those not capable of achieving the middle school certificate, compulsory education was reduced from the age of 18 to 16 years.
2. The length of vocational education was reduced from four to three years, which was mainly in response to the falling numbers of lessons in general education. In the past, vocational education was divided into two parts, two years' general education and two years' vocational training. Now, both elements have been integrated. Pupils can now enter work life much more quickly.
3. In the last few years, children have increasingly started school at the age of seven instead of six. The government is aiming to reverse this trend of later school enrolment. From 2013, parents will no longer be involved in the decision-making process to determine whether children are ready for school. Children who turn six by 31 August (previously 31 May) can now be held ready for school. To ensure that all children can start school, the National Public Education Act was amended to allow schools to accept 32 children in a class instead of the 27 permitted previously.
4. From September 2014 – with a few defined exceptions – kindergartens shall be compulsory for all children from the age of three years (instead of five years previously). In pursuing this line, the government is looking to support children from socially weak families and ease their integration in society.
5. In the past, local administrative authorities were obliged to secure primary education for their local children. In line with the National Public Education Act of 2011 (Act No CLXXXVIII, 2012), the state will take over responsibility for maintaining local schools in districts with a population of less than 3,000, if this is the district's wish. Even larger local authorities can hand over their schools if they are not capable of maintaining the schools themselves. Local authorities have to submit a request for this and pay a subsidy to the state. Increasing net debts of local authorities has led to this regulation. The secretary of state in charge expects the change to lead to an improvement in the technical situation of schools, an increase in the quality of lessons, and a reduction in social inequality. Opponents on the other hand speak of undesirable centralization and social leveling. From 1 January 2013, about 2,750 local authority schools were transferred to the relevant state body, the *Klebelsberg* Institution Maintenance Centre. The directors of state school are appointed by the relevant minister. Teaching staff (i.e., teachers themselves and those that indirectly support the work of teachers) in state schools receive their salaries from the state, in other words the *Klebelsberg* Centre; other staff are paid by the local authorities. School buildings and the fittings remain the property of the local authorities who are still responsible for operation expenses.
6. In the course of school year 2013–2014, governance and monitoring systems for state schools change. There are 198 school districts corresponding to the number of counties and 19 for the municipalities. Both types of school districts

are maintained by the *Klebelsberg* Centre. Head teachers report to the heads of the county school districts. Municipal school districts are responsible for vocational education, for special pedagogical services, and for residential schools. Heads of school districts are responsible for managing the institutions; for coordinating their pedagogical work; for maintaining relations to school heads, teachers, etc.; and for regularly compiling reports and supplying information. There is also a team of specialist advisers who observe lessons and consult teachers on development opportunities.

7. From September 2013, kindergartens or the lower level of secondary schools must be available in each town, if petitioned by the parents of at least eight children.
8. From school year 2013–2014 – starting with Year 1 and then rising year for year – textbooks will be provided free of charge by the state for all pupils attending general schools, for schools of ethnic minorities, and for special day-care centers.
9. Schools have to check that their pedagogical programs comply with the National Public Education Act and the new core curricula. From 2012 to 2013, daily sports lessons will be introduced for all pupils in compulsory education – starting with Years 1, 5, and 9 and rising year for year. From September 2013, ethics or religion became mandatory lessons in general schools – starting in Years 1 and 5. Fifty-two percent of Year 1 parents and 42 % of Year 5 parents chose lessons in religion.
10. Earlier plans promulgated by the Ministry of Education focused on the introduction of whole-day schooling for all; this remains optional for kindergartens.
11. In 2002, the *Medgyessy* government pushed through the last significant (roughly 50 %) salary increase for teachers since the salary level was very low; consequently, the number of applicants for teacher training decreased and teachers dropped of schools. In its election campaign, the second *Orbán* government pledged to increase teacher salaries, a move which then had to be postponed in the light of the precarious economic situation of the country. The new job model for teachers and the related salary increase and working time directive come into force in September 2013. There will be five teacher categories: (1) the trainee, (2) teacher grade I, (3) teacher grade II, (4) teacher grade III, and (5) teacher researchers (with PhDs). To move between categories, teachers will have to gain extra qualifications. Teachers' salaries and the number of hours taught will depend on this categorization.

Changes have also been made in the postsecondary and higher education sector (Act No CCIV on Higher Education). The most important changes are as follows:

1. A new tertiary vocational program of a maximum of five semesters has been introduced for students holding the advanced secondary school certificate who do not want to, or who cannot, study for a university degree. In the past, similar two-year courses were offered at universities and at the upper level of secondary schools. The programme needs to be accredited by the university.

2. From 2013 to 2014 onwards, the dual system of teacher training will be incrementally abolished. In the future, students training to become teachers at general schools will study four years and to become teachers at higher schools five years, at university. This will be followed by a one-year teaching practice. Applicants will have to take a suitability test organized by the university. In an effort to increase the number of student teachers and to achieve a degree of selection, the government will provide scholarships.
3. For economic reasons, the state is increasingly cutting back its financing of higher education. The rationalization of the higher education system (e.g., the consolidation of universities, reduction of programmes) is a long-term target of the education ministry, which has not yet been implemented. For the same reason, the government introduced – with rather limited success – the *partial* scholarship (2012), only partly financed by the state. The introduction of a mandatory student contract has drawn heavy criticism and student protest. In this contract, students have to work in Hungary for the same length of time for which they received financial support from the state. This time has to be “recovered” within 20 years of completing their degree; otherwise, they will have to repay their whole financial support to the state.
4. Heated debate caused the number of state-financed students to fall (2012); this was not only due to financial reasons but was also rooted in demographic change. The regulation was particularly damaging for smaller universities outside of Budapest.
5. In its selection of scholarships, the government was attempting to manage the career choices of young people by primarily supporting technical and natural science students and students of IT, agriculture, and education.

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T. Stefansson (✉) • R. Karlsdottir
Norwegian University of Science and Technology, Trondheim, Norway

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22.1 History and Social Parameters of the Education System

22.1.1 Cornerstones of Historical Development

Teaching children to read and write at home has been a general custom in Iceland from at least as early as the sixteenth century (Thorláksson 2003, pp. 186, 386). However, the development of a primary school system did not start until in 1907 when school attendance was made compulsory for children aged 10–13 and primary schools were gradually established in all towns and rural communities. The development of the academic branches of the upper secondary and tertiary school systems can be traced back to two church schools founded in the twelfth century. These schools were the precursors of the General Grammar School of Reykjavik founded in 1904 and the Theological Seminary founded in 1847. Together with the School of Medicine founded in 1877 and the School of Law founded in 1908, the Theological Seminary was merged into the University of Iceland in 1911. The development of the vocational branches of the present upper secondary and tertiary school systems can be traced back to the period between 1880 and 1920 when several special vocational schools were founded and to the 1930s when secondary schools offering 2- and 3-year courses with their emphasis on practical subjects were opened in most of the towns and rural regions.

22.1.2 Relevant Stages of Educational Reform and Innovation Measures Over the Past 30 Years

Two partly conflicting objectives have guided the development of the education system in this period. On the one hand, the objective has been to define the system's accountability towards society, to strengthen and simplify it, and to adapt it to social and economic realities. On the other hand, the objective has been to define the system's accountability towards the individual pupil and secure his or her needs and general welfare.

The entire set of Parliamentary Acts regulating all levels of the education system has been rewritten twice during the past 30 years in an effort to reach a functional compromise between these objectives. Increased emphasis has been put on evaluation, supervision, and the gathering of information at all levels. New methods of managing have been introduced through the use of performance-level agreements between individual institutions and the authorities and financial models based on per pupil rates. This has decentralized decision making and increased the responsibility of each institution.

Iceland

		Grade	Age
	Specialised University College	17	23
	University	16	22
		15	21
		14	20
	Postsecondary institutions	13	19
	Upper Secondary School (academic branch)	12	18
	Upper Secondary School (vocational branch)	11	17
	Upper Secondary School	10	16
		9	15
		8	14
	Lower Secondary School	7	13
		6	12
		5	11
		4	10
	Primary School	3	9
		2	8
		1	7
		6	6
	Pre-primary School	5	5
		4	4
		3	3

At the elementary, compulsory, and upper secondary levels, the main issue has been to develop an inclusive education system and methods for individualized teaching within the framework of group education. At the upper secondary level, the development of curriculum and course programs has been decentralized and more flexibility been allowed in organization, teaching, and learning, making it

easier for the schools to develop new teaching methods and programs of study. Choices have been made clearer for the pupils and the change of paths, without losing previously earned study credits, made easier. Emphasis has been put on the strengthening of vocational education and training, the distinction between vocational and academic education made less rigid, and access to university made easier for persons with vocational qualifications. At the tertiary level, research activities have been strengthened.

At the upper secondary and tertiary levels, all schools and institutions have been connected through an electronic communication network making it possible to diversify local teaching activities through a distant learning approach. Seventeen regional Lifelong Learning Centres for distributing learning resources have been established as cooperation between upper secondary schools, municipalities, and local organizations. The merging of vocational special schools into larger institutions at the upper secondary and tertiary levels that started in the 1970s has continued, and by the end of this period, no vocational special schools remain.

22.1.3 Sociopolitical, Socio-economical, and Sociocultural Context Conditions of the Education System

The Icelandic society has one of the highest levels of social equity among OECD countries. About 76 % of the population belong to the Lutheran church of Iceland, about 63 % live around the capital city of Reykjavik, and about 94 % live in communities with more than 200 people. Trends towards regionalization are weak judging from the enrolment rate to upper secondary school that varies between 90 % and 97 % over the regions. There are no traditional ethnic minorities although about 6 % of pupils in compulsory school have another mother tongue than Icelandic. The salaries of Icelandic teachers vary between 60 % and 80 % of the average in the OECD area, and their professional prestige is mediocre. Guardians are expected to participate in school matters through guardian councils, except at the tertiary level (Statistics Iceland 2013; OECD 2012).

22.2 Fundamentals, Organization, and Governance of the Education System

22.2.1 Current Leading Ideas and Principles in Education Politics and Policies: Basic Objectives of the Education System

The overall objective of the education system is to foster active and responsible individuals and prepare them for life and work in a continuously evolving democratic society. The system promotes professionalism, stresses quality, defines aims, clarifies demands, evaluates performance against fixed standards that specify expected results, and offers flexibility that takes care of the needs of the society.

This is done in accordance with the fundamental principle of the education system that everyone should be included and given equal opportunities to acquire an education irrespective of origin or handicap. Hence, the system is also designed to provide the best possible continuity from level to level and offers flexibility that takes care of the intrinsic interests, needs, skills, and desires of each individual.

There is a millennium-old tradition for studying abroad at the tertiary level. Exchange of students between the Icelandic and the European education systems is well regulated through bilateral and multilateral agreements, and many teachers at the upper secondary and tertiary levels have earned their university degrees abroad. Thus, there are strong formal and personal ties to universities abroad.

Nonformal education is recognized as an important human resource. Most of this education is organized as cooperation between institutions at the compulsory and upper secondary levels, municipalities, and public and private organizations.

22.2.2 Legislative Framework of the Education System

The education system is governed by six Parliamentary Acts (The Ministry of Education 2013): Preschool Act No 90, 2008 (*Lög um leikskóla*); The Compulsory School Act No 91, 2008 (*Lög um grunnskóla*); The Upper Secondary School Act No 92, 2008 (*Lög um framhaldsskóla*); The Higher Education Institutions Act No 63, 2006 (*Lög um háskóla*); The Public Higher Education Act No 85, 2008 (*Lög um opinbera háskóla*); The Adult Education Act No 27, 2010 (*Lög um framhaldsfræðslu*); and The Act on Education and Recruitment of Teachers... No 87, 2008 (*Lög um menntun og ráðningu kennara*...). The Ministry of Education is responsible for the implementation of this legislation at all levels and the issue of General Curriculum Guidelines for schools at the elementary, compulsory-lower, and upper secondary levels. At these levels head teachers are responsible for drawing up school curricula and teachers are responsible for the assessment of pupils. At the tertiary level, university faculties are responsible for drawing up curricula and teachers for assessment of students. The overall standard of the education system is monitored by the Ministry of Education.

22.2.3 Governance of the Education System

The Ministry of Education is responsible for the overall governing of the education system, issuing regulations, and planning educational reforms. The administration of public preprimary and compulsory schools is delegated to local municipalities while the ministry governs public upper secondary schools and tertiary institutions directly. Private schools and institutions are governed by private organizations certified by the Ministry. At the upper secondary and tertiary levels, all institutions are subject to written performance-level agreements between the individual institutions and the ministry specifying the scope of the institution, its appropriation

from the annual state budget, registration fees, curriculum, programs of study, teaching methods, evaluation methods, and for private institutions also the number of students, their legal rights, and tuition fees. At the elementary level, a school committee elected by the local authority is responsible for school affairs. Schools are directed by a head teacher. At the compulsory level, a school board elected by the local authority is responsible for school affairs in each school district. Schools are directed by a head teacher advised by a school council representing teachers, pupils, and parents. At the upper secondary level, the minister appoints a school board of five members that is responsible for the affairs of each school. At the tertiary level, the administration of universities is entrusted to senates and vice-chancellors.

22.2.4 Funding the Education System and Its Infrastructure

The municipalities pay for the construction and for most of the running costs of schools at the preprimary and compulsory levels using funds allocated from the state budget. In addition, parents contribute about one-third of the operating costs of schools at the elementary level. Pupils with a handicap diagnosed by the State Diagnostic and Counselling Centre are granted an individually adjusted allowance that they receive through the school system. The cost of educational material and national coordinated examinations at the compulsory level are allocated from the state budget. At the upper secondary level, 60 % of the cost of construction of schools and investment in equipment is allocated from the state budget, and the local municipalities that are parties to the establishment of the school allocate 40 %. All other costs are allocated from the state budget.

At the tertiary level, all institutions receive individual appropriations from the state budget and charge enrolment fees. All private institutions have income from tuition fees. Continuing and adult education is financed by tuition fees and grants from state funds. Schools and institutions can usually keep their own income.

22.2.5 Relationship Between Public and Private Sectors in Education

About 9 % of the schools at the preprimary level are private and enrol about 9 % of the pupils at this level. About 6 % of the schools at the compulsory levels are private and enrol about 2.5 % of the pupils. About 40 % of the schools at the upper secondary level are private and enrol about 34 % of the pupils. About 43 % of the universities are private and enrol about 17 % of the students (Statistics Iceland 2013). The same legal framework applies for the public and the private sector, and they are subject to the same provisions concerning internal and external reviews and quality control. At all levels, private institutions must be accredited by the Ministry of Education. This also applies to public institutions at the tertiary level. The main distinction between public and private institutions apart from their

sources of income is in their legal framework concerning budgetary responsibilities, recruitment procedures, and transparency.

22.2.6 System of Quality Management and Support of Educational Establishments

The Ministry of Education is responsible for the evaluation and monitoring of the education system. All schools are required to conduct internal evaluations that are regularly evaluated by the ministry. The ministry also conducts regularly direct evaluations of schools to assess the quality of the education system and identify areas of improvement. In compulsory school nationally coordinated formative tests composed, organized, and marked by the Educational Testing Institute are given in Icelandic and mathematics at the end of Years 4 and 7 and in Icelandic, mathematics, and English at the beginning of Year 10. Local municipalities are responsible for following up the results of evaluations of schools at the elementary and compulsory levels. The ministry is responsible for following up results of evaluations of institutions at the upper secondary and tertiary levels. The education system has been reviewed regularly by the OECD, and Iceland takes part in a number of OECD's studies (PISA, PIRLS).

Local municipalities are responsible for providing general health checks for the pupils; school counselor and psychologist services for pupils, their families, teachers, and the school in general; educational services connected to special education; and adequate support for the handicapped.

The ministry is responsible for supplying educational material to the compulsory level free of charge. The National Centre for Educational Materials receives annual appropriations from the state budget for this purpose. The ministry is also responsible for initiating educational reforms and development and grants support for this purpose from the Educational Development Fund that receives annual appropriations from the state budget.

To be certified as a teacher at the preprimary, compulsory, or upper secondary levels, the requirement is a minimum of 5 years of university study (M.A, M.Sc.) or a diploma in vocational training and in addition 1 year of study of pedagogy and didactics. At the tertiary level, a doctorate degree is required for senior lecturers and professors. Other teachers are required to have at least a master's degree. Head teachers must be certified teachers at the level in question and have teaching experience at that level or management education.

22.3 Overview of the Structure of the Education System

22.3.1 Preprimary Level (ISCED 0)

The goal is to provide children with safe and healthy environment in which to grow up. Play is seen as the main route to maturing and learning, and the emphasis

is put on stimulating motor development, language development, artistic creation, and music and learning about nature and environment and culture and society. Schools at the preprimary level are open for all children up to the age of 6 although few schools accept children less than a year old. Handicapped children have the same rights as other children to attend school and must be given special assistance or training when this is required. The program for these children is the same as for other children but adapted to their ability. In most schools, children with another mother tongue than Icelandic receive special language instruction. In 2012 about 6 % of the children at this level were given special assistance or training and about 11 % received special language instruction (Statistics Iceland 2013). When the demand for school places is larger than the municipality can meet, priority is often given to handicapped children, children of single parents, and children of students.

22.3.2 Primary (ISCED 1) and Lower Secondary Levels (ISCED 2A)

The primary and lower secondary levels form a single structure, compulsory level, for children aged 6–16, and the education generally takes place at the same school. Compulsory schools operate for 9 months a year, starting by the end of August and ending by the beginning of June, comprising a total of 180 school days. In general the school day starts between 8:00 and 9:00 a.m. and finishes between 3:00 and 5:00 p.m. Monday to Friday. Each lesson normally lasts 40 min, but schools can plan their teaching around longer hours. In Years 1–4, the number of normal lessons is 31 per week, in Years 5–7 35 per week, and in Years 8–10 37 per week.

The total scheduled school time in Years 1–10 is distributed between subjects in the following manner: Icelandic 19 %, mathematics 16 %, science 8 %, and other subjects 57 % (Statistics Iceland 2013). Assessment is carried out at regular intervals by individual teachers and schools and expressed in the form of numbers, letters, and oral or written descriptions. On completing compulsory school pupils are issued with a certificate which specifies the subjects they have taken and the marks they have received. There is no difference between the position of public and private schools in the structure of the school system. The main difference will be found in their pedagogical approach.

22.3.3 Special Schools for Handicapped Pupils

Integration with support is the primary approach to the education of handicapped pupils at the compulsory level. When integration is not appropriate, the pupils are educated in special units for children with disabilities and severe deviations that are operated at some compulsory schools or at one of the four special schools that take care of the needs of children with psychiatric, social, mental, and multiple disabilities. About 1 % of the pupils are educated in special education classes and about 0.3 % in special schools (Statistics Iceland 2013).

22.3.4 Upper Secondary Level (ISCED 3)

Anyone who has completed compulsory school, has received an equivalent education, or has reached the age of 16 years is entitled to commence study and has the right to continue to study at the upper secondary level until the age of 18 years. Anyone commencing study at this level can request that his or her real competence in subjects that are within the curriculum of the study in question be assessed and expressed in credit units and accumulated together with other credits given in the study. Schools can set minimum requirements for admissions of pupils to individual programs of study.

Education is generally provided in a single institution on a full-time basis although schools may accept individual pupils on a part-time basis. There are two main types of branches of study: academic branches leading to matriculation after 3–4 years of study (ISCED 3A) and vocational branches leading to labor market relevant vocational certifications after 2–4 years of study (ISCED 3C). On-the-job training is in most cases included in vocational branches of study, for example, in the form of an apprenticeship agreement made between pupil and a master craftsman or an industrial firm. In 2011, about 49 % of the pupils followed the academic branches of study (Statistics Iceland 2013). The Minister of Education can authorize schools to establish other branches of study. Some schools have, for example, established programs of study for disabled pupils. All branches of study must include the possibility of further education. Schools have either traditional class structure where all the pupils of a class follow a particular program of study or they operate according to a unit credit system with no rigid class structure.

In the academic branches of study and some of the vocational branches of study, assessment is the responsibility of the individual school. The journeyman's examinations within the certified trades are coordinated on the national level and are the responsibility of the trade in question. Some of the grammar schools that have class structure offer an extensive final matriculation examination at the end of the fourth school year. In schools based on the unit credit system, there are no final examinations. Assessment is based on written examinations given at the end of every semester and on assignments completed during the semester. Marks are given in whole numbers on a scale from one (lowest) to ten (highest). In the unit credit system, the pass grade for a course unit is five. In the class system, the passing grade is five in average for all subjects and four for individual subjects. On completing a branch of study, pupils are issued with a certificate which specifies which course units or subjects they have taken and the marks they have received.

22.3.5 Postsecondary (Non-tertiary) Educational Establishments (ISCED 4)

Education at this level is given by 11 institutions at the secondary level and 2 at the tertiary level. In 2011, the number of pupils in these institutions corresponded to about 4 % of the number of pupils at the upper secondary level (Statistics Iceland 2013).

22.3.6 Tertiary Level

There are four public and three private institutions at this level. The public University of Iceland dominates with about 72 % of the students and is the only institution at the ISCED 5A/6 level offering studies in all the main disciplines. The other institutions are small, specialized university colleges predominantly at the ISCED 5B/6 level.

Anyone who has completed matriculation examination, or according to the assessment of the institution in question an equivalent examination and has acquired comparable maturity and knowledge is entitled to commence study at university. The institutions can set minimum requirements for individual subjects upon the completion of upper secondary school or require students to pass entrance examinations or assessment. Some universities offer preparatory studies for students that do not fulfill the minimum requirements. Admission to some master or doctorate programs may require some minimum mark on a bachelor or master level. The Bologna process was fully implemented in all these institutions in 2006.

22.3.7 Adult and Further Education and Training

Some upper secondary schools offer academic or vocational distance education programs often in cooperation with one of the Lifelong Learning Centres and evening courses at upper secondary level leading to matriculation or vocational certification. A few municipalities organize evening schools, and a variety of courses are offered by private schools, companies, and associations. Job-related further training is offered by municipality schools and upper secondary schools. Due to the small average size of Icelandic companies, in service further training is relatively infrequent compared to other European countries. The same applies to retraining. At the tertiary level, some of the universities offer education leading to a university degree. The University of Iceland offers, for example, several 1- to 2-year programs on campus and a 4-year basic teacher training, distant learning program.

22.4 Developments in the Current School System

22.4.1 Transition Between School Levels

The development has been towards a more flexible transition between school levels. To improve the transition to the compulsory level, the educational component at the end of the preprimary level has been strengthened, and the possibility of extending the compulsory level to include the 5-year-olds is being considered. In 2011 about 5 % of the pupils entered the labor market after completing compulsory school (Statistics Iceland 2013). At the upper secondary level, one of the main issues is to shorten the total time used to obtain matriculation from 4 to 3 years.

Two contributions towards this have been made: some compulsory schools offer upper secondary school courses. The Upper Secondary School Act of 2008 grants upper secondary schools extended freedom to tailor their programs of study, and all schools now have the possibility of offering matriculation planned over 3 years.

22.4.2 Instruments and Measures of Quality Management in the School System and Within Schools

The trend has been to define better the references for assessment. Individual pupils are assessed in relation to the objective defined in the General Curriculum Guidelines. Internal evaluations of individual schools are performed in relation to school curricula. External evaluations performed by municipalities and the Ministry of Education are performed in relation to educational policy and performance-level agreements. The purpose of the evaluations is to identify areas of improvement concerning individual pupils, individual schools, and the education system.

22.4.3 Coping with Special Problems

About 10 % of pupils at the compulsory level suffer from behavioral problems (Sigurgeirsson and Kaldalóns 2006). In a separate subject, Life Skills, included in the compulsory and upper secondary school curriculum, behavioral problems are among the issues addressed, and the Ministry of Education has put forward guidelines to schools with suggestions on violence prevention. Several schools have introduced programs to deal directly with disciplinary problems and the performance of boys.

Units or classes must usually be repeated when minimum requirements are not met. At secondary level only about 44 % of the pupils complete their education in the stipulated time and about 58 % within 2 extra years. However ignoring time limits the overall graduation rate at the secondary level is about 88 % (OECD 2012). This problem is mainly addressed through special programs of study, special support to handicapped pupils and pupils with emotional and social problems, liberal readmission regulations, and the Live Long Learning programs.

22.4.4 Measures and Instruments for the Integration of Foreign-Born Pupils and Pupils from Second- or Third-Generation Immigrant Families

The Compulsory and Upper Secondary School Acts give pupils with another mother tongue than Icelandic the right to a special education in the Icelandic language and an opportunity to be educated in their own mother tongue. The aim is to achieve functional bilingualism enabling these pupils to study in Icelandic schools and participate in Icelandic society. All schools are required to formulate

reception plans for migrants, and at the compulsory level, there are migrant reception classes where children from migrant families get special instruction in Icelandic before they join their regular classes. The schools can recognize the proficiency in the mother tongue as a part of the fulfillment of the requirements for proficiency in foreign languages.

22.5 New Developments

The present discourse related to the educational system revolves around three aspects of the system: the throughput rate, the distribution of skills and knowledge in the output, and the ratio between the sexes in the output. The fraction of the pupils at the secondary level that complete their education in the stipulated time is the lowest in the OECD area (OECD 2012). One of the reasons for this may be the liberal readmission regulations allowing the pupils to migrate freely between education and the labor market. However it is a widely held opinion that another reason may be a lack of diversity in educational programs and that many of the pupils do not find satisfactory opportunities within the educational system. In an effort to counteract this, seven rural secondary schools have pooled their resources and established a distant education comprehensive school capable of offering a much broader selection of educational programs than each of the individual schools can manage on its own. The distribution of skills and knowledge in the output from the educational system both at the secondary and the tertiary level is not well adjusted to the needs of the labor market. There is a shortage of graduates within the vocational field and within computing and engineering. At the tertiary level, about 65 % of the graduates are women (Statistics Iceland 2013). In fields of study including science, mathematics, computing, and engineering, 67 % of the graduates were men while between 60 % and 80 % of the graduates in the fields of education, humanities, social sciences, health, and services were women. The distributions on fields of study and between the sexes are in keeping with a general trend within the OECD area (OECD 2012). These skewed distributions are the results of individual choices deeply rooted in the attitudes of young people and their perceptions of their capabilities and possibilities in the future. New developments in the educational system must address the problems this creates. The solution may include changing general outlooks and values. Within the educational system, this must originate at the elementary and primary levels.

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M. Clarke (✉) • M. Killeavy
University College Dublin, Dublin, Ireland

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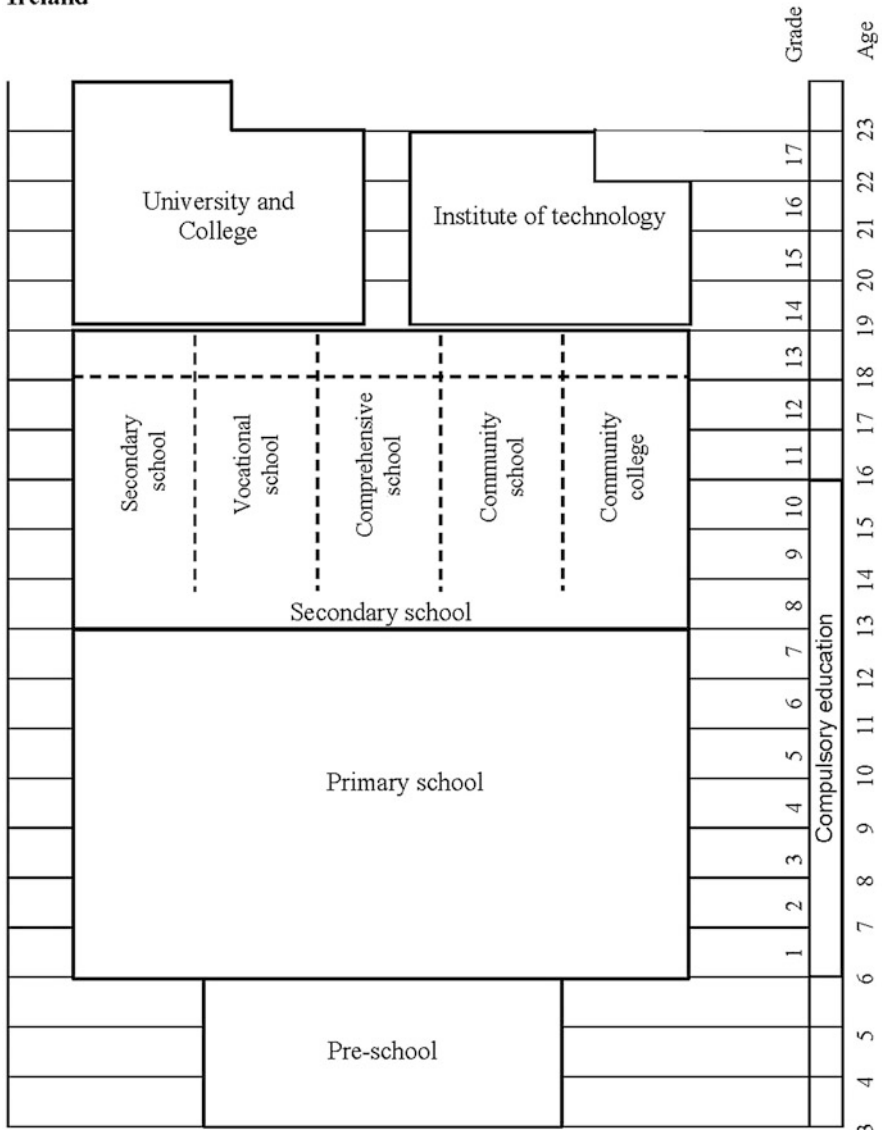
23.1 History and Social Parameters of the Education System

The Republic of Ireland is a small country of just over three and a half million people on the western fringe of Europe. It has been a self-governing state since 1922 and it is a member of the European Union. According to the OECD Report of 1991, Ireland has been an overwhelmingly Roman Catholic country up to recently, with over 90 % of the population belonging to the Roman Catholic Church. However, in recent years, a major increase in immigration has brought increased diversity to Ireland both in terms of ethnicity and, to a lesser extent, religious affiliation. According to the Central Statistics Office in Ireland, in 2011 still 97.4 % of the population having the Irish nationality are Roman Catholics. Including the immigrants of other countries in Ireland, the quota decreased already to 84.6 %. Because of these Catholic roots, and despite a rapid growth in the rate of economic development since the 1960s, Ireland has preserved many of the elements of its distinctive national culture and identity, such as the Irish language, and a distinctive national identity in literature and the arts. These factors are all reflected in the school system, which has roots not only in ancient Ireland but also in the developments of recent centuries.

23.1.1 Cultural Context and Cornerstones of the Historical Development of Schooling

During the so-called Dark Ages in Europe, Irish monks from the monastic schools in Ireland went as missionaries and teachers to the European mainland, where Ireland became known as the island of saints and scholars. Following the reformation in Europe and the political alignments which ensued, a series of penal laws were enacted by the British parliament. Under these laws, Roman Catholics were prohibited from taking part in social, political, and economic life; further, they could not own land, vote, enter the professions, or receive an education. As a result, education went “underground,” and “hedge schools” in which children were taught in secret and in defiance of the law developed and flourished. The folk memory of this activity became embedded in the national consciousness, a factor which is in part responsible for the high regard in which education and, to a lesser but important extent, teachers are held. This high regard of education is reflected even in modern times by the fact that, according to the national statistics, in 2011, 34 % of the Irish population had finished upper secondary education and 24.6 % even a higher

Ireland



education degree. With Catholic emancipation in the early nineteenth century, the laws authorizing exclusion from education on the grounds of religious adherence were repealed. At this time, a national system of education closely aligned to the religious denominations was established, and provision for the training of teachers similar to the system in England was set up.

23.1.2 Reforms and Innovations

The 1960s was a watershed in Irish education, and many of the developments which have occurred since then had their roots in the OECD report *Investment in Education* (1966). At primary level, the increased investment in education which was called for had the direct effect of reducing class sizes; classes are now approximately half as large as they were 30 years ago. A new curriculum was introduced in 1971, and this was revised more recently by the National Council for Curriculum and Assessment (NCCA 1999). During the 1970s, the professional qualification for primary teachers was extended from a 2-year diploma to a 3-year B.Ed. degree, and the former teacher training institutions became colleges of education associated with the major universities.

Major funding and structural changes in provision at the second and third level gave rise to the provision of free postprimary education in 1968, the gradual extension of university education, and the establishment of a new type of third-level institution, the Regional Technical Colleges, which were to become the Institutes of Higher Education. These developments in the higher education sector necessitated the establishment of regulatory bodies and infrastructural support services. In this period, the Higher Education Authority (HEA), the Higher Education Teaching Awards Council (HETAC), the Further Education and Training Awards Council (FETAC), the National Qualifications Authority, and other bodies were set up to provide for the monitoring and any necessary accreditation of the sector. Not surprisingly, many more students than in the past completed second-level education and took part in courses at the third level, where the participation ratio increased from 1:25 at the end of the 1960s to a current participation ratio of approximately 1:2. This means that in Ireland, approximately 50 % of a respective age cohort takes part in third-level education.

Far-reaching proposals for developments related to the curriculum and content of Irish education, many of which were heralded in *Charting Our Education Future* (Department of Education 1995) are currently being translated into practical measures through governmental policy initiatives and legislation. Most of these emerging policy initiatives are evolving from investigations of existing educational practices and provisions. For the most part, such investigations are undertaken by bodies of relevant stakeholders set up by ministerial decree, and the ensuing legislation derives to a considerable extent from their recommendations. While these developments are for the most part not directly concerned with teacher education, they all carry implications related to education and schooling in a general sense.

23.1.3 Sociocultural Context of the Current School System

To arrive at an understanding of education in Ireland, it is necessary to describe the society that the education system serves and to examine the context within which education and more particularly teacher education takes place. The Republic of

Ireland has a younger population than most other European states. An OECD report from 1991 recorded that half the population was less than 25 years of age (OECD 1991). Twenty years later, in 2011, 34 % of the Irish population were younger than 25 years. Because of poor employment prospects in Ireland during the 1980s, emigration to the USA, Britain, Australia, and more recently to mainland Europe was a necessity for many Irish people (Killeavy 1998). Economic growth from 1995 to 2007 (a phenomenon which has caused the Irish economy to be described as the Celtic tiger) has meant that the rate of emigration decreased noticeably and many people who had previously emigrated returned to Ireland to take up employment. Further, the availability of well-paid employment in Ireland resulted in immigration to the country both from the EU and globally. However, the period of prosperity did not last, and instead of the hoped “soft landing,” a major financial banking and financial crisis occurred. The sharp fall from “boom to bust” has resulted in financial stringency, job loss and consequent emigration, loss of income, and cutbacks in all social services including education. Currently, there are indications of some improvement; however, this is not likely to take considerable time. Further, it means that the development planning currently in train (excluding money-saving initiatives) is not likely to be finalized and put in place in the near future.

23.1.4 Educational Targets and General Functioning of Schools

The Department of Education and Science (DES) seeks through education to secure economic prosperity, social well-being, and a good quality of life for all citizens in a democratically structured society. Its role is underpinned by principles of pluralism and respect for the diversity of values, beliefs, languages, and traditions of Irish society. Furthermore, it claims that its provision spans early childhood education through adulthood, and it supports the concept of lifelong learning.

23.1.5 Socioeconomic Context

According to the OECD report of 1991, the Republic of Ireland is overwhelmingly a Roman Catholic country with 90 % of the population belonging to the Roman Catholic Church. Ireland is currently undergoing many cultural and social changes with the accompanying problems faced by most western societies. However, the country has taken pains to preserve many of the attributes of its distinctive national culture and identity, not only the Irish language, but also the country’s distinctive national identity in literature and the arts. These aspects of Irish life are reflected in the Irish education system and particularly in the culture of teaching. Nearly all state primary schools are denominational in their intake, management, and patronage and together with their organization and location are parish based (OECD 1991). At postprimary level, a similar if less pronounced trend is evident,

with the majority of secondary schools under the management of a religious denominational authority.

A major change in the sociocultural makeup of the school population in Ireland has taken place in recent years, with the immigration to Ireland of considerable numbers of Eastern European and African people. This has brought a growth in the ethnic diversity and first language of pupils in all areas of the country. Alongside this development, the national policy of inclusion of children with special needs in mainstream classrooms has resulted in greater challenges for class teachers. Government policy with regard to inclusive education has been backed up by a series of initiatives involving increased support for teachers. Regrettably, due to the current climate of financial stringency, not all of these developments have been continued in the comprehensive manner originally intended.

23.1.6 Social Position of Teachers

The social position of teachers in Ireland has traditionally been high compared with other countries. This is in part due to the importance of education in the early years of the state as a means of providing opportunities for children from large farming families. In an era lacking economic growth, the scarcity of employment prospects and the limited capacity of the farm to support more than one member of a family meant that education was respected as a means of upward economic mobility. The salaries of primary and postprimary teachers in Ireland are based on a similar structure, and the allowances for special qualifications and special positions or duties within the school are to a large extent similar. Allowances for additional qualifications no longer apply for beginning teachers, and a number of other reductions have also been put in place. These changes are due to the cutbacks of the last 5 years. The salary scale for teachers is presented in abridged form in Table 23.1.

Teachers in their first year of employment typically earn a little in excess of €30,000 per annum, while the principal of a small school could expect to earn €9,310 approximately per annum in addition to their basic salary. The incremental scale extends over a 25-year period, and apart from increased payments for principals, allowances are available for higher qualifications and in respect of posts of responsibility in the school. The hourly rate for teachers working in a part-time capacity is €41.64 per hour. These salaries compare favorably with salaries in many

Table 23.1 Teachers' salaries and allowances (based on data supplied by the Association of Secondary Teachers of Ireland for Teachers appointed post 1 February 2012 (2013))

Starting salary €30,702 per annum	Salary after 25 years €53,423 per annum
Principal's allowance one- to five-teacher school €9,310 per annum	Principal's allowance 61+-teacher school €29,776 per annum

The data on additional qualification is not presented as these only apply if gained prior to February 2012. The maximum for such allowances is €4,426 per annum

European countries; however, they must be viewed in the context of the high cost of living and the taxation system in Ireland.

23.1.7 Schools and the Position of the Family

The role of the family as the primary educator of children is enshrined in the Constitution of Ireland (1939), and parents' representatives are included in the Boards of Management for schools. Parents' organizations in Ireland are influential interest groups, and these groups are regularly included in bodies of stakeholders in the various commissions and other bodies established by the Department of Education and Science to deliberate on policy matters. Parents have the right to educate their children at home if they do not wish them to take part in school-based education. This arrangement is comparatively rare, however, and in cases where it occurs, the state has the authority to ensure that the provision is satisfactory and appropriate.

In former years, school attendance officers, who were usually members of the *Garda Siochana* (police force), were responsible for investigating cases of pupils who were absent from school for insufficient reason. Transgressions were often followed by parents being charged with an offense and faced with legal proceedings. In recent years, the new position of home school liaison community coordinator has been created to ensure positive and cooperative relations between parents and the school, and today this area is dealt with in a more positive and less punitive manner than previously. Further family support for problematic situations forms an important element of a number of the programs funded by the Department of Education and Science to combat disadvantage.

23.2 Fundamentals, Organization, and Governance of the Education System

The Irish school system is for the most part organized centrally, either directly or indirectly through the Department of Education and Science. It is governed by the provisions of *Bunreacht nah Eireann* (1932) or the Constitution of Ireland, by the legislation enacted by the *Oireachtas* or Irish Parliament and by the regulations of the Department of Education and Science.

23.2.1 Basic Legal Principles, Levels of Governance, and Philosophy of Government

Bunreacht nah Eireann states that parents are the primary educators of their children, and children's entitlements to education are outlined in Article 42 of the Constitution. The most recent legislation dealing with the system generally, the Education Act, 1998, specifies that education at primary and postprimary levels,

together with adult and continuing education, should be provided for every person in the country, including those with special educational needs. Under this legislation, most matters concerning education in general were precisely codified. The act stipulates that the education system must respect the diversity of values, beliefs, languages, and traditions and operate within a spirit of partnership between the school, patrons, students, parents, teachers, community, and state. The duty of the state under this act is to provide for the recognition and funding of schools and their local management bodies. The state must also provide for the Inspectorate of Schools and the establishment of a National Council for Curriculum and Assessment and define the roles and responsibilities of principals and teachers.

Much of the other current legislations concerning education followed from the Education Act, 1998. Under the Education (Welfare) Act, 2000, the National Education Welfare Board was set up to ensure that every child receives a certain minimum education. This act provided for the registration of children receiving education in schools that were not recognized under the state system and the compulsory attendance of certain children at recognized schools. The Education for Persons with Special Educational Needs Act, 2004, made further provision in this area and aimed to ensure that people with special educational needs are as far as possible educated in an inclusive environment with those who do not have such needs.

23.2.2 Financing

Nearly all primary schools in Ireland are state funded, and while the majority of these schools are denominational in their intake and management, the salaries of teachers are paid from central government. The costs of school buildings are also covered by the state, although it is customary for the local community and parish to provide the land on which schools are built. The major development in this area that is currently under discussion concerns the system of the patronage of primary schools. In March 2011, the Minister for Education and Skills announced the establishment of a Forum on Patronage and Pluralism in the primary sector. Extensive discussions have been carried out with relevant stakeholders, and it is now expected that by 2017, 20 new primary schools will be established under a new patronage model. The minister recommended that the criteria related to patronage should provide for diversity of school ethos, having regard for the views of parents. The small number of private schools at the first level charges fees and is privately funded.

At the second level, the financing of schools varies somewhat, although the majority of schools are state funded. The majority of secondary schools, which comprise about two-thirds of all schools at second level, are privately owned and managed under the patronage of religious orders (OECD 1991). These schools provide free education, are in receipt of state funding, and belong to the classical grammar school tradition. In private or fee-paying secondary schools, the state also provides funds for teachers' salaries, but the financial support is considerably less

than for the schools providing free secondary education. In comprehensive and community schools, which are secular but managed in a similar manner to secondary schools, teachers' salaries are also paid by the state. The vocational schools that provide second-level education do not charge fees.

23.2.3 Public and Private Schooling

The vast majority of primary schools in Ireland are publicly funded, and these schools form the state system of education at the first level. The small number of private schools at the first level are for the most part junior schools attached to fee-paying or private secondary schools. Some of these private first-level institutions also provide boarding establishments for pupils; these are usually availed of by parents of children who are living outside Ireland. A small number of fee-paying Montessori schools operate, usually in the cities, and one or two Steiner and alternative private schools also operate at the first level. While parents have the right under the Constitution to educate their children at home, this is a very rare practice.

23.2.4 General Standards of the School Education System

The National Council for Curriculum and Assessment (NCCA) was established in November 1987 and is designated as a statutory body under the terms of the Education Act, 1998. It includes teachers and their representatives, professionals in the field of education, and stakeholders such as parents. Its brief is to advise the Minister for Education and Science on matters related to curriculum and assessment procedures for primary and second-level education. It recently issued a revised primary school curriculum; however, there is no formal written examination for primary school pupils in Ireland. At postprimary level, the NCCA has proposed major developments to the junior cycle curriculum with an increased focus on literacy and numeracy. It has recommended a new kind of core and bringing assessment (some of which should be school based) closer to learning. The NCCA was responsible for putting in place the curriculum for the Leaving Certificate in its three forms that comprise the senior cycle program. The most important recent initiative in this area has been the development of Project Maths that was designed to develop essential problem-solving skills for higher education and the workplace.

23.2.5 Quality Management

Quality management at the primary level falls within the remit of the Inspectorate of the Department of Education and Science. Examinations of schools are carried out regularly by members of the Inspectorate, who are also responsible for the

certification of primary teachers in their first year after graduation from a teacher training program. The Inspectorate is less involved in the quality management of postprimary education; the assessment of the junior cycle programs and the results of the Leaving Certificate General, the Leaving Certificate Vocational Programme, and the Leaving Certificate Applied Examinations taken by pupils at the completion of the second level enable evaluation of the system.

23.3 Overview of the Structure of the Education System

23.3.1 General Structure: Overview

Full-time education is compulsory for all children in Ireland between 6 and 16 years of age and almost all children attend state schools. Although school attendance in Ireland is not obligatory until the age of 6, the vast majority of children begin school in the September following their fourth birthday. Children of this age in most other European countries attend preprimary or kindergarten schools. Streaming is not a feature of primary education in Ireland, and children are entitled to attend a state-maintained postprimary school upon completion of their primary education at the age of 11 or 12 years.

The schools that make up the postprimary sector include secondary, vocational comprehensive, and community schools and colleges. All postprimary schools receive state support, although fee-paying or private secondary schools do not receive the same level of support as schools in the public sector. Although compulsory education is completed at 16 years of age, second level education in Ireland is not divided into lower and upper school types, and pupils may continue at the same school if they wish to complete their postprimary schooling. The qualification available to pupils at the conclusion of postprimary school is the Leaving Certificate Examination.

23.3.2 Preprimary Education

No national system of preprimary education is provided in Ireland; however, a number of specially targeted programs for 3-year-old children have been initiated in recent years. These include programs for children with special needs, children of “travelers” (formerly called itinerants), and children experiencing social and economic disadvantage. The Early Start 1-year program for children aged three was established in October 1994 on a pilot basis. This initiative was designed to provide children at risk of educational disadvantage with an educational program that would enhance their development and prevent failure at school. A white paper called *Early Childhood Education: Ready to Learn*, which was published in 1999, provides a blueprint for the development and implementation of a comprehensive early education policy. Growing economic prosperity in Ireland has been followed by an increase in the number of married women working outside the home and of single

parents. This has necessitated increased provision of both childcare and preprimary education facilities on a fee-paying or private basis. Regrettably, the severe economic problems and the consequent difficulties, particularly rising unemployment, have been particularly problematic for young families for whom the costs of childcare is a major issue.

23.3.3 Primary Education

The aims of primary education are (i) to enable the child to live a full life as a child and to realize his or her potential as a unique individual, (ii) to enable the child to develop as a social being through living and cooperating with others and so contribute to the good of society, and (iii) to prepare the child for further education and lifelong learning (Primary school Curriculum 1999, Introduction p. 15).

The curriculum in Irish primary schools seeks to provide an extensive learning experience and to encourage a rich variety of approaches to teaching and learning that cater for the varying needs of individual children. A major revision of the primary school curriculum of 1971 was completed in 1999. This revised curriculum sought to reflect the changing nature of Irish society and to nurture children in all dimensions of their lives (National Council for Curriculum and Assessment 1999). The curriculum is organized into the following key areas: language; mathematics; social environment and scientific education (SESE); arts education, including visual arts; music and drama; physical education; and social, personal, and health education (SPHE). There is currently no formal system of state examination for pupils in Irish primary schools, although the work of schools is examined by the Inspectorate of the Department of Education and Science.

Primary schools in Ireland are funded by the state, and the current and capital costs of primary schools, together with teachers' salaries, are funded almost entirely by the state, supplemented by local contributions. Schools may receive additional funding according to their circumstances, for example, if they are serving particularly disadvantaged areas or children with special needs. While the teaching of modern languages does not form part of the primary curriculum, the discretionary curriculum time provided for in the revised primary curriculum allows schools to include a modern language where it is available.

The majority of national schools are state-aided parish or denominational schools, and their management structure is complex, having been established under the patronage of the local bishop. In recent years, there has been a growth of schools without the traditional form of denominational patronage. Such schools include multid denominational national schools, each under the patronage of a limited company without share capital, which were established in response to local parental demand, and some of the schools in English-speaking areas in which pupils are educated through the medium of Irish. Most national or primary schools are under the patronage of the local bishop, who usually nominates a suitable person or body of persons to act as manager. The patron also nominates trustees. Subject to the approval of the minister and the provisions of Section 16 of

the Education Act, 1998, the patron may at any time resume direct management of the school or may nominate another manager. The major development in this area, which has been outlined earlier, concerns the proposed developments in the system of patronage of primary schools. It is proposed that twenty new primary schools will be established under a new patronage model in the next 4 years. The criteria and procedures related to patronage are currently in the process of development. Details of the financial issues related to this development have yet to be finalized; however, it is envisaged that teachers' salaries and the running costs of the schools will be paid by the state as with the traditional model of state-funded primary school system.

23.3.4 Secondary Education

Second-level or postprimary school in Ireland extends over a 5- or 6-year cycle and includes five types of school: secondary school, vocational school, comprehensive school, community school, and community college. Secondary schools, which comprise about two-thirds of all schools at the second level, are privately owned and managed, usually by religious orders (OECD 1991). These schools, most of which provide free education, are in receipt of state funding, and they belong to the classical grammar school tradition. Vocational schools were originally established to provide technical education, but their role has been expanded to cover all areas of the second-level curriculum. Comprehensive schools were set up to meet the needs of areas without second-level education, and they offer a broad curriculum including both academic and technical areas. Community schools, which offer the same type of broad curriculum as comprehensive schools, were designed to serve as cultural and educational centers in their neighborhoods. Community colleges arose from the vocational tradition and are similar to community schools, except that the curriculum they offer is more extensive and they often cater for older students.

Second-level education in Ireland does not comprise a separate lower and higher sector with corresponding separate schools, but the program offered does involve a junior and a senior cycle. Schools at the second or postprimary level include secondary, vocational, community, and comprehensive schools. Secondary schools are privately owned and managed, and their trustees are religious communities or Boards of Governors. Vocational schools are administered by Vocational Education Committees (VECs), while community and comprehensive schools are managed by Boards of Management. The trustees of the majority of these schools are religious communities or Boards of Governors.

The aim of second-level education is to provide a comprehensive, high-quality learning environment which enables all pupils to live full lives appropriate to their stage of development and to realize their potential as individuals and as citizens. The 3-year junior cycle seeks to provide broad, balanced, and coherent courses of study in a variety of curricular areas relevant to pupils' personal development and to prepare them to proceed to the senior education cycle.

The senior cycle, which typically caters for pupils from 15 to 18 years of age, begins with a transition year program which provides students with wide-ranging

educational experiences and a period of work experience. The Leaving Certificate Examination is held at the end of the senior cycle in postprimary schools, and pupils are selected for entry to third-level courses on the basis of points awarded for their results in this final examination.

In recent years, the senior cycle program has been restructured to include alternative forms of the Leaving Certificate program and assessment. Pupils opting for these alternative forms take a more vocationally oriented course and complete the Leaving Certificate Applied or the Leaving Certificate Vocational Programme. The aim of this development was to encourage pupils to continue in full-time education after the end of compulsory schooling at 16 and to provide a range of programs suited to their abilities, aptitudes, and interests.

23.3.5 Special Education Schools

Special education in Ireland includes the provision of special programs for pupils with particular learning disabilities which are conducted separately from mainstream schools and in schools in institutions such as clinics and hospitals. In recent years, however, national policy has focused on the inclusion of pupils with special needs in ordinary classrooms in all situations where this is possible. This has necessitated the provision of personnel and physical means to meet the special needs of pupils with learning disabilities. Such provision includes the appointment of resource teachers and special needs assistants (SNAs) to help class teachers and the provision of special needs organizers (SNOs) in school districts to support teachers in schools.

Together with the provision of personnel, the NCCA has developed a series of curriculum guidelines for children with a range of learning disabilities including general, mild general, moderate, and severe and profound disabilities. The development of the National Educational Psychological Service (NEPS) was largely based on the need for the assessment of children with special needs.

23.3.6 Postsecondary and Tertiary Education

Postsecondary education includes further education and post-Leaving Certificate courses. Other non-state agencies also provide courses at this level. Tertiary education in Ireland is a binary two-sector system and includes the nonuniversity third-level colleges and institutions.

23.3.7 Postsecondary Education

This sector forms part of the area developed under the Further Education and Training Awards Council (FETAC), and many of the qualifications that it provides are part of the National Qualifications Framework. This allows for the progression of successful candidates to higher-level courses and in some cases to degree courses.

23.3.8 Tertiary Education in Nonuniversity Institutions

The 13 Institutes of Technology located throughout Ireland provide higher education to large numbers of students. These developed out of the series of Regional Technical Colleges (RTCs) that were established nationwide as part of the major expansion in third-level education provision at around 1970. As part of this expansion, the National Council for Education Awards (NCEA) was set up in 1971 with academic responsibility for the nonuniversity third-level sector. The Dublin Institute of Technology was formally established under the Dublin Institute of Technology Act, 1992. It incorporated the College of Technology, Kevin Street (established in 1887); the College of Technology, Bolton Street (established in 1911); the College of Commerce, Rathmines (established in 1901); the College of Marketing and Design, Mountjoy Square; the College of Catering, Cathal Brugha Street (established in 1941); and the College of Music, Adelaide Road (established in 1890) (Higher Education Authority 2003). The Higher Education and Training Awards Council (HETAC), a national body, was established in 2001 under the Qualifications (Education and Training) Act, 1999 to take on the role formerly fulfilled by the NCEA. The HETAC is the validating body for most of the courses run by the Institutes of Technology, and this body confers national certificates, diplomas, and undergraduate and postgraduate degrees up to doctorate level. Holders of a HETAC/DIT diploma or certificate may, in certain circumstances, be entitled to transfer credits to one of the universities in order to complete a relevant course of higher qualification.

23.3.9 Tertiary Education University Institutions

The university sector in Ireland is part of the public sector in that it is to a large extent financed by the Exchequer. At the same time, the universities have traditionally enjoyed a degree of institutional autonomy, which was strengthened in the Universities Act, 1997. Academic staffs in Ireland are public servants with tenured employment. There are eight universities in Ireland. Four of these are now separate but linked institutions, reflecting their federal organization within the National University of Ireland before the reconstitution of the sector by the Universities Act, 1997. These four include: University College Dublin (UCD), the National University of Ireland, Dublin; University College Cork (UCC), the National University of Ireland, Cork; University College Galway (UCG), the National University of Ireland, Dublin; and University College Cork (UCC), the National University of Ireland, Galway, and the National University of Ireland, Maynooth (NUIM). The remaining four institutions are the University of Dublin (Trinity College), Dublin City University (DCU), the University of Limerick (UL), and St. Patrick's College Maynooth (the Pontifical University).

The National University of Ireland also includes five recognized but separate institutions: the Royal College of Surgeons in Ireland (RCSI), the National College of Art and Design (NCAD), the Institute of Public Administration (IPA), the

Shannon College of Hotel Management, and St. Angela's College of Education for Home Economics in Sligo. Courses and academic staff in these colleges are recognized by the NUI, which awards degrees to students who successfully complete recognized courses.

Trinity College Dublin (TCD), the first and only constituent college of the University of Dublin, was founded in 1592 by Queen Elizabeth I. Three colleges for the education of primary school teachers and one college specializing in the education of teachers of home economics are associated with Trinity College.

Dublin City University was established in 1980 as the National Institute for Higher Education in Dublin, and the University of Limerick was established in 1972 as the National Institute for Higher Education in Limerick. Both institutions became universities in 1989. There are two colleges of education associated with DCU and one college associated with the UL.

23.3.10 Teacher Education

There are seven universities in Ireland which award the qualifications required under state regulations for employment as a teacher in primary and secondary schools. The most usual method of entry to the primary teaching profession is through a 3- or 4-year Bachelor of Education (B.Ed.) degree program. The five colleges of education that offer degree programs for entry to primary teaching are each recognized colleges of one of the main universities, which validate their particular qualifications. Teachers at the second level have typically completed a degree program such as a BA or BSc prior to undertaking a 1-year postgraduate university graduate diploma to qualify as a secondary teacher. A limited range of B.Ed. programs in specific subject specializations providing a professional qualification for postprimary teachers are also available. In addition, there are a small number of nonuniversity institutions which offer specialist teaching qualifications that are accredited by the National Council for Educational Awards.

There are two main forms of professional training for teachers in Ireland, namely, concurrent and consecutive, which are associated with primary and secondary teacher education, respectively. In the concurrent model, students follow a 3- or 4-year program in education, practical teaching, and one academic subject to degree level. The choice of degree subjects typically includes English, French, geography, history, Irish, mathematics, and music. Upon successful completion of this type of program, students are awarded a B.Ed. degree, which qualifies them to teach in primary schools. This is the method of entry to the profession for the majority of primary teachers. However, when there is a shortage of teachers, as is the case currently, the consecutive model has been used as a way of dealing with the problem. Diploma courses of approximately 18 months' duration are being offered in the colleges of education for university graduates who wish to enter the primary teaching profession.

The other model of teacher education is a consecutive one in which graduates who have successfully completed a degree course such as a BSc or a BA take a

1-year course toward a Higher Diploma in Education (HDipEd), which has come to be known as a Professional Diploma in Education (PDE or PD). While this is the most usual method of entry to the teaching profession at secondary school level, there are a number of concurrent teacher education programs for specialist teachers at the second level in areas such as home economics, instrumental music, and physical education.

Entry to undergraduate teacher education courses is on the basis of merit as assessed in the final examination at the completion of second-level education. Selection is made nationally by the Central Applications Office, in which all applications for places in higher education are processed. The selection of graduate applicants for entry to second-level teacher training is, for the most part, centrally administered on the basis of academic merit. Assessment is based on candidates' undergraduate degree classification and grade, their postgraduate degrees, and other qualifications and relevant prior teaching experience. One institution, Trinity College Dublin, retains an interview to assess candidates' suitability for teaching as part of its assessment criteria.

Major developments to teachers to both the consecutive and concurrent education programs currently under discussion that involve proposed restructuring of the institution involved in the sector are currently in train. These are discussed in detail below.

23.3.11 Types of Field Experience

The procedures, extent, and type of field experience during preservice teacher education programs vary in accordance with the particular model of professional preparation followed by teacher education students. The concurrent B.Ed. program typically involves approximately five teaching practice placement sessions totaling 12 weeks in all. These are designed to provide student teachers with a varied range of teaching experience in the primary school system with respect to age group, both multiple and single grade level classes, socioeconomic background, urban and rural origin, and gender of pupils. The field experience or teaching practice element of the B.Ed. program has always been a very important part of teacher preparation.

Field experience within the consecutive model usually comprises five half days each week or the equivalent during the 1 year postgraduate diploma course. This experience includes attendance at school and observation together with a minimum of approximately five periods of actual class teaching in the student's subject specialization. Course work at the university also typically involves elements of field experience such as microteaching, practical teaching methodology sessions, and various supplementary teaching activities.

The eight colleges of education located throughout Ireland are each associated with one of the university institutions. Three of these colleges, the Mater Dei Institute of Education, St. Angela's College of Education, and St. Catherine's

College of Education for Home Economics, offer programs leading to a teaching qualification for specialized subject areas at postprimary school level. The five remaining colleges of education provide approved degree courses which lead to a B.Ed. degree qualifying the successful candidate as a primary teacher. The Church of Ireland College of Education, Froebel College of Education, and Coláiste Mhuire, Marino, are associated with Trinity College Dublin. The Mary Immaculate College of Education and St. Patrick's College of Education are associated with the University of Limerick and Dublin City University, respectively.

23.4 Developments in the Current School System

Ireland is undergoing a process of cultural and social change with the accompanying problems faced by a number of European countries. These changes include the effects of declining employment in agriculture and consequent growth in urbanization, the decision of recent referenda concerning divorce and abortion, an increase in foreign travel, a rise in the number of single-parent families, the impact of new technology, and the access to world media. Economic problems have been a major feature of the last 5 or 6 years. Following the very significant economic growth of the decade following 1995, a major national financial crisis reversed almost all the trends associated with the earlier prosperity. Unemployment became commonplace, emigration became a necessity once again, and the costs of social services, not only health but also education, caused considerable problems. The national economy has improved somewhat and there are indications that these improvements continue, if at a slow pace.

23.5 New Developments

The developments, which have taken place in Europe, have generally been embraced by Ireland. One of the most pressing initiatives concerns the areas of assessment, accreditation, and qualifications, and these are most relevant in further and tertiary education. The National Qualifications Authority (NQAI), established in 1999 had the task of encouraging and maintaining international liaison in this area. The NQA has set out a regulated set of standards to apply across the board in relation to certification, and equivalences between qualifications both within Ireland and with other European countries have been established. The proposals and suggested developments of the Bologna Declaration (1999), the Salamanca Convention (2001), and the meeting of European Education Ministers in Prague (2001) have been put in place, and universities have adopted the European Credit Transfer System. In November 2012 NQAI was dissolved and its functions were passed to Quality and Qualifications Ireland (QQI). A number of important other developments which have been noted are currently at the discussion stages. It is hoped that the current climate financial stringency will not have a negative impact on their future development.

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S.-J. Blöchle (✉)

Bundesinstitut für Berufsbildung, Bonn, Germany

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24.1 History and Social Parameters of the Education System

24.1.1 Cornerstones of Historical Development

From the fall of the Roman Empire to its unification in 1861, Italy was fragmented into numerous smaller states; there was no compulsory schooling, and education was regulated by the Catholic Church. The first state-run schools provided free of charge were introduced in the Kingdom of Sicily in 1778. With the unification of Italy, the notion of a general, state-run education system – initially formulated in the Casati law of 1859 and originally intended for the Kingdom of Piedmont-Sardinia – was extended to all other regions and laid the foundations for the school system of present-day Italy (Allemann-Ghionda 1999; Brinkmann 1995). As Italy's first minister of education, Gabrio Casati first introduced compulsory schooling covering two years which gained significance in the light of the prevailing illiteracy rate of 75 %. *Scuola elementare* preceded secondary school, which was divided into two elements: traditional secondary schools comprised a first stage of five years' duration (*ginnasio*) and a second of three years' duration (*liceo classico*); and technical-scientific secondary schools consisting of two- to three-year stages, the technical school (*scuola tecnica*) and the technical institute (*istituto tecnico*). In addition, there was the two-year *scuola normale* at which primary school teachers were trained.

In 1877, primary school was extended to cover five years, the first three of which were compulsory. Public debate on the responsibility of schools following the spread of child labor during the initial phase of industrialization led to the extension of compulsory education. According to the *lex Orlando*, children had to attend school until they reached the age of twelve. The Daneo-Credaro law of 1911 led to the state taking over the burden of funding and administering the entire compulsory school system.

The Fascist takeover in 1922 heralded a new phase in the development of the Italian school system. A renowned professor of philosophy at the University of Rome, Giovanni Gentile, became Minister of Education in 1923. He instigated a comprehensive school reform which aimed at tightening the selection of pupils and the education of the elite in accordance with Fascist ideology. The reform focused on secondary school, with its traditional, philologically oriented *ginnasio/liceo* remaining the most important form of schooling. Gentile introduced an entrance examination following the five-year primary school and a number of other restrictive selection procedures which led to a significant decline in pupil numbers and enrolments at university. In addition to the *ginnasio/liceo*, which was the only school type enabling pupils to pursue their education in the tertiary sector without restriction, there were technical institutes (*istituti tecnici*) that entitled students to

Italy

				Grade	Age
				17	23
				16	22
				15	21
				14	20
				13	19
				12	18
				11	17
				10	16
				9	15
				8	14
				7	13
				6	12
				5	11
				4	10
				3	9
				2	8
				1	7
					6
					5
					4
					3

University (Bachelor, Master, PhD)	Professional Education Center (3-5 years)	Higher Technical Education and Training (part-time, full-time)			
Grammar School (liceo)	Technical College	Vocational College			
			Vocational Training Center		
Middle School (lower secondary education)					
Primary School					
Crèche, Kindergarten					

enter specific technical faculties and seven-year schools for training primary school teachers (*istituti magistrali*). The reform also introduced scientific grammar schools (*liceo scientifico*) to enable pupils to take up a course of study at the scientific and medical faculties of universities. In contrast, the new grammar school for girls

(*liceo femminile*) was explicitly not aimed at preparing girls for tertiary education; its goal was rather to provide an extended general education. In a bid to extend compulsory education until the age of 14 provided for in Gentile's reforms, complementary schools (*scuola complementare*) were established for those pupils who did not want, or were not allowed, to attend secondary school after they had finished primary school. In 1931, the three-year post-primary vocational schools (*scuole di avviamento professionale*) emerged from the complementary schools. In reality, however, these schools were only introduced in larger cities, and eight years of compulsory education were unattainable for many young people. In 1940, Gentile's successor instigated a partial unification of the lower level of secondary education (*scuola media inferiore*). But this was merely the common base of higher schools and hardly a comprehensive school as we know it today. This only came about around 20 years later. The mandatory nature of Latin in schools continued to contribute to the strict selection of pupils. Quite separate from the other secondary schools were the practically self-contained vocational schools, the *scuole di avviamento professionale*.

With the fall of Fascism and the movement away from a monarchy toward a republic, 1946 witnessed an increasing wave of democratization. A commission revised the curricula to remove aspects of ideology but the overall structure; the dual system remained as it was until the beginning of the 1960s. A large proportion of the pupils attended the five-year general primary school; secondary education remained the reserve of a small elite. In 1963/1964, the center-left coalition introduced the *scuola media unica*, a three-year comprehensive middle school. But the main point of contention here was the role of Latin, which was now introduced as an option from Year 8. Latin was an instrument of selection for acceptance in the *liceo classico*; pupils could attend all other types of upper level secondary school once they had successfully passed through *scuola media*. Whereas in 1953, only 35.5 % of a cohort attended school until they were 13, by 1974 this had risen to 86.6 % (Fadiga Zanatta 1976).

The growing need for highly qualified pupils and university graduates to feed the flourishing economy, together with the student demonstrations of 1968 eventually led to a further liberalization of the education system. In 1969, all pupils with a certified five-year secondary education were entitled to enroll at a university. At secondary schools that did not already offer five years' education, an extra preparatory course was created thus avoiding having to exclude these schools from university study.

24.1.2 Important Reforms and Phases of Innovation in Education and School Policies in the Last 30 Years

Whereas the 1960s and 1970s were characterized by liberalization and efforts to achieve greater equality in education, primarily by merging educational facilities into a type of common schooling, the years that followed only brought about isolated change. In 1994, formal grades were replaced by an oral assessment of achievement up to *scuola media*; in 1997, a law was passed that recognized greater autonomy for schools; in 1998, the training of primary school teachers that to date

had taken place in vocational schools became the prerogative of universities; 1999 saw the introduction of a form of post-secondary vocational education (*istruzione e formazione tecnica superiore, IFTS*); and in 2000, a law on the equality of private and public education came into force that considerably improved the financial status of private education facilities. In the same year, under the minister of education Luigi Berlinguer, a large-scale reform of the school system was developed that envisaged increasing compulsory education to 15, compulsory vocational education up to the age of 18, and access to university to the age of 18. With the fall of the government in spring 2001, these reforms were put on ice, and the new center-right coalition, with its education minister Letizia Moratti, developed its own reform plans which were passed in 2003, plans that integrated the increase in compulsory school and vocational education (*obbligo formativo*). Furthermore, this Reform No. 53 enabled pupils to change easily between all disciplines and forms of vocational education at the upper level of secondary education and facilitated the mutual recognition of achievement. Moreover, a key element of the reform was the strict separation of practical-vocational and academic schooling. Those schools complementing their curricula with vocational elements, the *istituto tecnico* and the *istituto d'arte* were formally assigned to the branch of grammar schools (*licei*). The role of the remaining *istituti* became unclear, both in terms of their vocational training function and in terms of their administrative assignment between the national ministry of education and the regional government responsible for vocational education. Because of another change of government in 2006, these reforms were never fully implemented. Subsequent to yet another change of power in favor of the center-right government in spring 2008, at the end of October of the same year and following waves of public protest, a law was passed that envisaged the reintroduction of numerical grades in primary schools from 2008 to 2009. Further, children could not be forced to repeat a year for underachieving, and single-teacher classes were reintroduced in primary schools.

24.1.3 Political, Economic, and Cultural Framework for the Development of the Education System

Italy is a democratic republic comprising 20 regions, five of which enjoy a special status with extended rights of autonomy, including education (the Aosta Valley, Friuli-Venezia Giulia, Trentino-Alto Adige/Südtirol, Sardinia, Sicily). The country covers 301,336 km² and has a population of 58.7 million, of which 2.7 million are foreigners. At an average density of 195 people per square kilometer, 67.6 % of the population lives in urban areas. The birthrate stands at 1.3 children per woman (Destatis 2006). With an old-age dependency rate of 28.9 %, over 60 % of the state's social benefits are paid for retirement and survivor's pensions, the highest values in the EU (2005/2006). Italy also has the highest rate of debt measured against GDP in the EU of 106 % (EU average, 61.4 %) (EU 2007). The Roman Catholic Church still has a major influence on cultural life and around 88 % of church and social taxes are paid to the Catholic Church (Eurispes 2009).

In 2005, 65 % of the economically active were employed in the service sector, 30.8 % in the manufacturing industry, and 4.2 % in agricultural, forestry, and fishing (Destatis 2006). There is still a marked contrast in the country between the highly developed north and the traditionally structurally weak south. This divide is also reflected in employment statistics. The general labor force participation rate for 2006 stood at 58.4 % (in the south, 46.6 %), the participation rate for women stood at 46.3 % (in the south, 31.2 %). The unemployment rate in recent years has steadily sunken, largely due to changes in labor market legislation and the increase in temporary work agreements, and in 2006, unemployment rate stood at 6.8 % (in the south, 12.3 %) (SVIMEZ 2007). Youth unemployment is particularly high (i.e., unemployment among 15–24-year-olds) at 23.5 % (in the south, 37.6 %) (EU 2004). GDP per capita in 2006 amounted to € 25,032 (in the south: € 16,699; compare with 37.6%) (Istat 2008).

Total public spending on the education system in 2006 amounted to 4.59 % of GDP (EU 2008); Italy is the only OECD country that spends less than 1 % of its GDP on the tertiary sector (OECD 2007a). Italy has not kept pace with other economically successful countries in terms of general qualifications. In 2005, just 17 % of the population between 25 and 64 had a primary school education, 32 % had completed the lower level of secondary education, 38 % possessed an advance school leaving certificate, and nearly 13 % had a higher education qualification (OECD 2007b). Italy's public sector, including education, is an extremely popular employer, primarily because of the combination of relatively low demands on work with simultaneous job security. At European level, employee salaries are very low while the cost of living is high (Eurispes 2009).

24.2 Fundamentals, Organization, and Governance of the Education System

24.2.1 Current Educational Policy and Goals of the Education System

The Italian education system has suffered from political instability in the country brought on by numerous changes in government in such a relatively short period of time. Initiatives instigated by one government will mainly be stopped when the government changes. Then, after a long process of dialog, initiatives are reformulated, always accompanied by the risk of having responsibility dissolved again. To date, nobody has succeeded in systematically and efficiently remedying the central problems of the education system. Concrete steps are urgently required to counter inefficiencies in the school system (OECD 2007a), namely, the high number of pupils finishing school early, low levels of achievement, low participation rates in regional vocational education framed by high youth unemployment, an underdeveloped system of adult education and defective advisory facilities, and the absence of a national system of quality assurance and development for the schools and teachers of the country.

24.2.2 Legal Foundations of the Education System

The central legal basis for the Italian education system is the Italian constitution of Jan. 1, 1948. This provides for academic freedom; the state's obligation to ensure the establishment of schools of all types and for all levels that are accessible for all without restriction; the right of all higher education facilities to determine their own legal form themselves; the right of everyone to establish schools and other pedagogical institutions; the rights and duties of parents to educate and bring up their children; the right of those capable and worthy to attain the highest possible level of educational achievement, even if they do not have sufficient economic means; the right of the disadvantaged and disabled to educational and vocational integration (EU 2007/2008). Also anchored in the constitution is the exclusive right of the central government in Rome to pass laws on general school education. As a result, the general school system in all 20 Italian regions is by and large the same. Matters are however different in terms of professional training and development, which is regulated at regional level and thus very heterogeneous.

24.2.3 Management of the Education System

Italy's administration is traditionally centralist in nature. A significant change was brought about in 1997. Since then, regions, provinces, and local districts accept all administrative tasks that are not the express reserve of the central government in Rome. The primary fields of competence for the national Ministry of Education (*Ministero dell'Istruzione, dell'Università e della Ricerca, MIUR*) include: universities and science, organizational and legal questions relating to the general school system, the legal status and assignment of school staff, the compilation of general curricula, criteria and parameters for organizing the school network, evaluating the school system and examinations, and funding. At regional level, the ministry is represented in the form of regional school authorities (*Uffici Scolastici Regionali*), which primarily take care of personnel issues. Moreover, the ministry is represented by school authorities (*Uffici Scolastici Provinciali*, formerly *provveditorato*) in provincial capitals (with the exception of the autonomous regions). Also at national level are two facilities associated with the ministry: the National Institute for the Evaluation of the School and Vocational System (*istituto nazionale per la valutazione del sistema educativo di istruzione e di formazione, INVALSI*) and the National Institute for the Documentation, Innovation, and Research in Education (*Istituto Nazionale di Documentazione, Innovazione e Ricerca Educativa, INDIRE*) that was reinstated in September 2012 after the National Agency for Development and Promotion of School Autonomy (*Agenzia nazionale per lo Sviluppo dell'Autonomia Scolastica, ANSAS*) was restructured in January 2007.

The regions are responsible for planning vocational courses in cases where vocational-oriented schools and the national school system overlap, and for courses

in regional vocation programs, the planning of the school infrastructure, the school calendar, and for providing funds for private schools and regional vocational education facilities. When it comes to establishing, merging or closing schools, and to monitoring these processes, the respective provinces are responsible for schools in the upper level of secondary education, the local districts for facilities from crèches to middle schools. The competence of the individual schools was extended in 2001/2002 in administrative matters but primarily also in relation to the planning of courses and their specific design (curricula, range of courses offered, organization of lesson times, group work, and general didactics).

24.2.4 Financing the Education System and Its Institutions

The Italian education system is primarily financed by the national government. Education facilities are relatively free in the specific appropriation of funds assigned to it, only bound by the obligation to use resources mainly for education and advisory activities. In addition, regions can provide funds to public and private facilities for concrete projects. While the state is financially responsible for the administration and educational content of education facilities, the regions provide funds for ancillary services (catering, transport, specific teaching materials, socio-pedagogical support services, financial aid). Furthermore, the regions commission provinces and local districts to maintain and service school buildings. Attendance at school, from kindergarten to final examinations, is fundamentally free of charge. Families only have to cover the costs of transport, catering, and school books – incrementally based on their financial situation. Various fees are incurred for university study and private education facilities.

Italy's overall spending per capita in secondary education is in line with the OECD average, while it is above average in the primary sector, significantly in preschool education. Italy is the only OECD country to spend less than 1 % of its GDP on the tertiary sector (OECD 2007a); and public spending for the tertiary sector did not grow at all between 2000 and 2005. On the other hand, the proportion of private funds grew significantly by 51 % and is now above the OECD average. It also heads all other EU countries (OECD 2008).

24.2.5 Relationship Between the Public and Private Sectors in the Education System

In 2000, new provisions governing the relationship between the public and private sectors of education in Italy were introduced in law, granting increased recognition to non-state-run facilities. Depending on who maintains the school, non-state-run schools are divided into public (*pubbliche*) and private (*private*) facilities. Public, non-state-run schools are those maintained by regional, provincial, or district authorities. Schools maintained privately (religious or confessional schools) are described as non-state-run private schools. Schools that meet certain criteria for

recognition (staffing, equipment, parent participation, equal access rights for pupils, curricula, and teaching methods in harmony with the constitution and school legislation) can be recognized by regional authorities as *scuola paritaria* (equivalent schools) and may grant the same awards as state-run schools and can fall back on funds from the public hand. On average, 72.3 % of all schools in Italy are state-run schools (54.7 % of kindergartens and up to 89.2 % of middle schools). Most of the non-equivalent schools (*non paritarie*) can be found in the preschool sector, whereas the number of non-equivalent schools in the secondary sector is negligible (MPI 2008).

24.2.6 System of Quality Development and Support in Education Facilities

For decades, quality assurance in Italy's education sector primarily took place via a set of input controls which mainly affected administrative aspects. A holistic approach to quality assurance that broadly monitors education achievements still does not exist today. However, 1999 did see the introduction of the first measures relating to a new understanding of quality.

At this time, a legislative decree was issued awarding more rights of autonomy in a number of fields to all schools from 2001 to 2002. This obliged every school to present their activities in a school plan (*piano dell'offerta formativa*) and to publish their offerings for all to see. This was compiled by the teaching staff and is still seen as a key component of internal quality development in schools. Since 2004, the National Institute for the Evaluation of the School and Vocation System (*Istituto nazionale per la valutazione del sistema educativo di istruzione e di formazione, INVALSI*) has taken over the external evaluation of the education system.

The task of the National Institute of Documentation, Innovation, and Research in Education (*Istituto Nazionale di Documentazione, Innovazione e Ricerca Educativa, INDIRE*) is to operate educational research and consulting, to train school staff, to develop documentation systems, to take part in international initiatives in the field of skill development, to implement a national system of adult education, and to collaborate with regional and local institutions in the field of higher vocational training (*istruzione e formazione tecnica superiore, IFTS*).

Since 2002, all training and development centers (*centri di formazione professionale (CFP)*), which involve the majority of regional vocational education facilities, are subject to an accreditation process if they wish to receive government grants. This aims to ensure the quality of education in an area that is largely in private hands. The criteria and minimum requirements on such centers are defined at national level, however, accreditation is the responsibility of the 20 regions, each of which apply different procedures.

In the tertiary sector, the National Agency for the Evaluation of Higher Education and Research (*L'Agenzia nazionale di valutazione del sistema universitario e della ricerca, ANVUR*) was founded in 2008.

24.3 Overview of the Structure of the Education System

24.3.1 Pre-primary Education

The first educational facility assigned to the Ministry of Education is the kindergarten or nursery school (*scuola materna/dell'infanzia*), envisaged for children aged two-and-a-half to six. The entry age was officially lowered in September 2009 after tests were conducted in many facilities on permitting children younger than three, the previous age for admission. Attendance at nursery school is not compulsory and is usually free of charge, with the exception of costs incurred for transport and catering. A nursery school year usually runs from 1 September to 30 June of the following year. In 2007/2008, each teacher at state nursery schools was responsible for the care of 11.3 children.

The care of children up to the age of three years takes place in crèches (*asili nido*) and is regulated at regional and district levels. This is subject to costs. In 2006, there were 3,131 crèches, of which 46 % were in private, often catholic, hands. Overall, there are not enough places at crèches to meet demand; an average of 27 % of all applications are not successful (Milan, roughly 25 %; Naples, 46 %). Italy provides just 8 % of children up to the age of 3 years a place in a crèche (EU Lisbon guidelines by 2010, 33 %) (IFEL/ANCI 2008).

However, when it comes to the care of 4-year-olds, Italy heads the EU table with nearly all children in preschool care (EU 2008).

24.3.2 Primary Education

The first obligatory school cycle begins in September with the five-year primary school (*scuola primaria/elementare*) for all children who turned six years old by 31 August. If requested by their parents or custodians, children who will turn six years old by 30 April of the following year may also be admitted. Schools have a degree of leeway in the manner they organize everyday school life. However, lessons have to take place five days per week covering a total of 871 h (27 h per week). Lessons can take place either only mornings or in a combination of mornings and afternoons, either with lunch at home with the family or with lunch at school. In addition to regular lessons, optional extracurricular activities can also be organized. Including the provision of lunch, the week cannot extend beyond 40 h. Learning materials are free of charge and are provided by the local district authority.

Children may have to repeat Years 1, 3, and 5 depending on levels of achievement. Since 2008/2009 schools again give numerical grades to record achievement, and single-teacher classes are also being reintroduced. In 2007/2008 average class sizes at public schools were 18.7 pupils, with 10.3 pupils per teacher (MPI 2007/2008).

24.3.3 Lower Secondary Education

After completing primary school, pupils attend the three-year middle school (*scuola media/secondaria di primo grado*). The obligatory curriculum was extended by 66 h in 2004 to include additional lessons in English and Information Technology (IT) and now comprises 957 h per school year. In addition, in an effort to meet the wishes and needs of families, schools are called on to organize other activities related to the curriculum of up to 132 h per school year (four hours per week). The additional activities selected by the families at the beginning of the school year then become part of the mandatory school program for the pupil. On top of this, each school can choose whether to offer lunch to the pupils or not (EU 2007/2008). The third year at middle school ends with a national examination (*esame di stato*) which needs to be passed to secure entry to the upper level of secondary school (*secondo ciclo*).

24.3.4 Special Needs Schools

The integration of the disabled (*alunni diversamente abili*) was gradually introduced from 1977 onwards, and, with just a few exceptions, special schools are abolished. Initially, this applied to nursery schools, primary, and middle schools; however in 1992, the right to integration in all educational facilities – from crèches through to universities – was anchored in law (Act No. 104). In 2006/2007, children with disabilities amounted to 2.3 % of the overall school population at public schools (MPI 2008).

Classes with disabled pupils should not exceed 20 in number (25 in exceptional cases). Such classes are entitled to support teachers who are specially trained to take care of specific disabilities as well as a socio-psycho-pedagogic service (EU 2007/2008).

24.3.5 Upper Secondary Education

After completing the lower level of secondary education (*scuola primaria/elementare* and *scuola media/secondaria di primo grado*) and passing the relevant examination (*esame di stato*), pupils can enroll at a variety of higher schools:

- Five-year grammar school (*liceo*) specializing in *artistico* (arts), *classico* (classic languages), *linguistico* (modern languages), *scientifico* (science), *musicale e coreutico* (music) and *delle scienze umane* (formerly *istituto magistrale*)
- Five-year technical college (*istituto tecnico*), following a specialism in economics and two other subjects or following the technology specialism (*tecnologico*) and nine other subjects
- Five-year vocational college (*istituto professionale*) with a focus on services (*servizi*) and four other subjects or a focus on industry and handicrafts (*industria e artigianato*) and two other subjects

Students can enroll at university once they have completed the fifth year of upper secondary school education and have passed the advance school leaving certificate (*esame di stato*, or the *maturità*).

Originally envisaged to counter the number of early school leavers, part of the traditional regional vocational system was transferred to the state school system in 2003. Pupils who do not achieve at school can transfer to vocational training centers (*Centri di Formazione Professionale, CFP*) maintained by the regions to complete their compulsory education in three to four year courses (*percorsi sperimentali*) and receive practical training with general education (*istruzione e formazione professionale*). Since 2010/2011, this model project has been institutionalized, and 22 three-year and 21 four-year vocations containing national minimum standards have been approved. Pupils also fulfill their compulsory education when they take up an apprenticeship contract of employment, which they may do from the age of 15. Mutual recognition of achievement between the various forms of education helps facilitate change as required. Some schools offer the same course in the morning time and in the evening, with a slight reduction in the number of hours to be taken.

24.3.6 Post-secondary (Non-tertiary) Education

The traditional, if somewhat insignificant, post-secondary education system has undergone a major expansion in recent years. For decades, this type of education (was virtually exclusively for sporadic professional courses run by largely private (often catholic) training and development centers (*Centri di Formazione Professionale, CFP*) for various target groups that today still do not differentiate between initial vocational training, development, and re-training. Only 2.7 % of all 19–24-year-olds took part in post-secondary vocational education in 2004/2005 (ISFOL 2006).

In 1999, an even less frequented and little-known form of higher vocational education was established, the Higher Technical Education and Training course (*Istruzione e Formazione Tecnica Superiore – IFTS*). This targets job starters, the employed, and the unemployed. *IFTS* courses are planned and delivered in regional associations of a variety of education facilities (training centers, universities, schools, companies). Nationally, uniform minimum standards and planning guidelines were drafted for 46 vocations. All courses last from two to four semesters each containing 1,200–2,400 h of instruction, of which 30 % can be in the form of a work placement (MPI et al. 1999). Since this form of education was introduced, 110 associations had been set up by 2007, with 3,425 courses carried out for just fewer than 60,000 participants (MPI 2008).

About ten years later, another post-secondary form of education was established, the higher technical institutes (*istituti tecnici superiori, ITS*). They are also an association of facilities: in addition to the *istituto tecnico* or an *istituto professionale*, the association also has to contain four other facilities, at least one of which has to be private company. Courses are set up solely on the basis of regional development plans. In 2011/2012, 58 higher technical institutes were launched in 16 regions. Courses last four semesters and cover 1,800 or 2,000 h.

To enroll, students need to have passed the advanced school leaving certificate (*diploma di istruzione secondaria superiore* or the *maturità*) and an entrance test.

For a long time, the so-called *apprendistato* filled the gray area between apprenticeship and employment contract. In reality, this never lived up to its claim and has been in a state of restructuring since the labor market reform of 2003. The *apprendistato* was never a formalized form of vocational education (with the exception of South Tyrol – Südtirol); there were never any standardized vocations, neither curricula nor final examinations, and employers alone were responsible for the training. Although legally prescribed, a survey conducted in 2005 ascertained that only 15.8 % of under-18 students actually attended organized lessons or were even offered these at all. The national legal basis for the “new traineeship” (*nuovo apprendistato*) was created in September 2011. In the course of 2012, complementary provisions were provided by the regions enabling the *nuovo apprendistato* to be implemented in most regions from 2013. The *nuovo apprendistato* comprises three roughly different forms of agreement: an earlier example of the *apprendistato* is the *apprendistato professionalizzante*, or professional apprenticeship, a mainly three- to five-year employment contract for career entrants over the age of 18. As before, the employer is responsible for the training in accordance with the industry-specific national collective agreement (*Contratti Collettivi Nazionali di Lavoro, CCNL*), but now they have to appoint a tutor to be responsible for the trainees and present a training plan (*piano formativo individuale*). The regions are responsible for the organization of the 120 h of instruction (for the three-year programme) in which interdisciplinary skills are to be taught. There is usually no final examination at the end of the training. Instead, the skills acquired are entered in the trainee’s training log (*Libretto Formativo del Cittadino*).

Fifteen to twenty-five-year-olds now have the possibility of acquiring a vocational qualification via the *apprendistato per la qualifica e per il diploma professionale* which to date could only be achieved through full-time vocational college education for the 22 (three-year) or 21 (four-year) vocations for which the regions are accountable (*istruzione e formazione professionale*). The regions themselves decided which vocations are available for these trainees. They also decide on the relationship between practical and theoretical components. The courses usually last as long as purely academic training programmes.

Ultimately, all vocations and the respective qualifications are to be opened up to a model based on learning at work. The *apprendistato di alta formazione e di ricerca* (higher vocational training and research) allows 18- to 29-year-olds to gain university entrance qualification and university degree and higher vocational qualifications (*IFTS* and *ITS*) through this dual vocational training system. The specific design of these programs is also in the hands of the regions.

24.3.7 Tertiary Sector

Italy’s university education system comprises a total of 94 facilities: 56 state universities, three technical universities, 16 private non-state-run universities,

three institutions for foreigners, 6 solely offering postgraduate masters' programs, and eleven distant learning universities.

The remodeling of Italian higher education to meet the requirements of the Bologna process of 1999 took place relatively quickly. With the exception of human and veterinary medicine and dentistry, all courses have been converted to a three plus two model, although this might not be so apparent at first glance. The first level of university education comprises the three-year bachelor degree (*laurea triennale*). Upon completion of the bachelor degree, students can enroll for a two-year master's course (*laurea specialistica/magistrale*). Besides PhD programs (*dottorato di ricerca*), universities also offer special diploma courses providing knowledge and skills for practical professional work (e.g., in the field of medicine). Such courses target both bachelor and master graduates. Universities also offer a special master program (one-year minimum study or 60 ECTS) with a particular focus on professional training. These are usually very costly programmes.

For decades, a university degree in the respective subject was sufficient qualification to apply for a position as a teacher at secondary school through national job allocation system. From 1999 to 2009, aspirants to the teaching profession at secondary schools had to undergo a two-year postgraduate specialization program (*scuola di specializzazione per l'insegnamento nella scuola secondaria, SISS*). Since 2011, bachelor graduates now also take a two-year master's program for prospective teachers to which access is limited. Afterwards, there is a one-year teaching practice (*tirocinio formativo attivo, TFA*) covering 475 h where students are accompanied by an experienced teacher in the role of the student's tutor. The training of primary school teachers has only been university-based since 1998. Before then, training took place at vocational colleges at upper secondary school level. In 2011, university courses for primary school and preschool teachers were increased to five years. Subsequent professional admission courses (*abilitazione per la scuola primaria e dell'infanzia*) to which access is restricted round off the training.

University study is subject to students' fees which vary between universities and disciplines. University fees are charged at the university's discretion. Fees have more than doubled in the past ten years and the trend it set to continue. In 2005/2006, average annual fees amounted to 880 Euros. In order to guarantee the constitutional right to university study, students from low-income family and those with above-average achievement may have university fees, meals, accommodation, and transport refunded, either wholly or in part. This group of students can also secure an interest-free loan from banks under certain conditions (EU 2007/2008). There is no direct financial assistance from the state. The criteria for the granting of indirect financial assistance are redefined every three years by a council of ministers. In August 2008, a law was passed that enables state universities to become private trusts in the future.

24.3.8 Adult Education

Adult education in Italy is very much underdeveloped and is poorly utilized. At 4 %, participation in non-formal vocational education programmes for 25–64-year-olds is

the lowest rate of all OECD countries for which data is available. Participation by adults with lower level of secondary education schooling is particularly low at 1 %; whereas 12 % of graduates in the age group participate in adult education (OECD 2007a). In the last few years, some political initiatives have emphasized the central importance of lifelong learning, and a number of isolated, mainly regional, projects have started. At national level, community education centers (*Centri Territoriali Permanenti, CTP*) for adults were set up at public schools in 1997 (mainly focusing on catching up on professional qualifications and on language and integration courses for immigrants), and in 2004, a national training fund was established (*Fondi Paritetici Interprofessionali per la Formazione Continua, FPI*). Some regions have introduced education vouchers that grant employees subsidies for educational programs. According to the Italian chambers of commerce, 19.8 % of Italian companies provided development and training programs for their employees in 2006 (Unioncamere 2007).

Overall, the Italian market for adult education is experiencing a strong trend toward commercialization. Courses offered by a variety of providers (universities with master's and distance learning programmes, regional and private training centers, chambers of commerce and industry, trade unions, etc.) are usually very expensive. Independent consultation and information from educational providers is rare and the absence of a national network makes such details difficult to come by.

24.4 Developments in the Current School System

24.4.1 Transfer Between School Years

The education reform No. 53 from 2003 extended the possibility of pupils repeating a year to include Year 7 and introduced a centrally organized examination (*esame di stato*) of the end of the middle school, which pupils have to pass in order to transfer to the upper level of secondary education. In 2006/2007, 94.7 % of pupils enrolled in schools in the national system at the end of the lower level of secondary education; only 5.3 % took part in courses offered by regional vocational schools or followed the *apprendistato*. Within the national system, 41.4 % of pupils attended the various grammar schools, 34.4 % attended a technical institute, 20.4 % a vocational college, and 3.8 % a schools of arts (MPI 2008). Up until 2009/2010, technical institutes and vocational colleges distinguished themselves from grammar schools – especially during the first three of the five years – by having the vocational elements taught in addition to the normal core curriculum covering all schools in the upper level of secondary education. As a consequence, pupils at these schools had to cope with 40 h of lessons per week, whereas grammar school pupils had lessons for 30–34 h per week. Despite their supposed vocational orientation, both of these school types have a strong focus on theoretical learning, and 50 % of the curricula in the last two years are still made up on general subjects. This fact might well be the reason that “real” vocational education (*formazione professionale*) is traditionally seen as the more practical training offered by the

regions in contrast to the vocational courses offered by schools (*istruzione professionale*). However, these mainly three-year vocational courses operated in the regions are not really an option for graduates of the lower level of secondary education. Much more, they are seen as an alternative to school education for young people who can no longer cope with the more intensive theoretical lessons of schools. Most of the time, pupils land in these regional schools in a second step after failing to achieve well at the upper level secondary school they have attended (ISFOL 2006). These regional courses did not receive any recognition in the formal education system up to 2003, but since then they have become part of the formal system of the upper level of secondary education; and qualifications acquired and achievement attained are now recognized across the whole level of state-run schooling. However, the provision of such courses is very uneven: 57.4 % of participants come from three northern regions (Lombardy, Veneto, Piedmont), whereas provision in most other regions is still very low (MPI 2008).

After passing the *esame di stato* – the advanced school leaving certificate – students can enroll a university or try their hand on the labor market, a market characterized by an unemployment rate of 23.5 % among young 15–24-year olds (in the south, 37.6 % (EU 2004). There was no other possibility of gaining other post-secondary education qualifications outside the university system in Italy until 1999, until the higher technical education and training course – the *istruzione e formazione tecnica superiore (IFTS)* – was launched. However, this did not have any direct connection to secondary education, and although associations of institutions have grown, they are still too unevenly distributed and largely unknown. The situation of grammar school graduates choosing not to study at university was particularly grave in Italy since at this time they had no chance of securing vocational qualifications in the formal system. In recent years however, Italy has recognized the significance of qualified vocational education and is trying to expand this much neglected sector. Since 2011/2012, students with their advanced school leaving certificate in their pockets can now attend higher technical institutes (*istituti tecnici superiori, ITS*).

Because more traditional forms of formal education are deeply rooted in Italian society, grammar schools have enjoyed enormous popularity, and vocational education has tended to be seen as a somewhat inferior. Besides the creation of the ITS, other new developments – in particular, those relating to the new traineeship, the *nuovo apprendistato* – can be seen as a sign of the increasing value being attributed to vocational training, especially in the transfer from school to work (if not so much in the eyes of the general public, then at least for those directly involved).

In this connection, the Italian socio-economic research institute CENSIS has drawn attention to what it sees as the key problem here: the poor dissemination of information concerning the new provision of vocational education (CENSIS 2007). In a survey, 57.7 % of young people questioned said that careers advice given at middle schools was too general, if not nonexistent (15.4 %). In addition, 51.4 % of parents are of the opinion that information on vocational education courses (*istruzione-formazione professionale*) is insufficient.

24.4.2 Quality Development and Quality Assurance Measures in Schools

Italy has made noteworthy progress in educational participation in recent decades and has always attained above-average levels of achievement in primary education (EUIRSPES 2009). However, international comparative studies such as PISA have highlighted serious shortcomings in the quality of the Italian secondary school system. Italy's 15-year-olds found themselves near the bottom of all the categories of performance investigated. Results revealed striking disparities between the regions (much worse in the south than the north) and between the various types of school – the grammar school (*licei*) were the best, vocational colleges (*istituti professionali*) the worst. But there were also significant differences in achievements between schools of the same type, an indication of the discordant nature of the learning environment at school and the strong influence of social factors (MEF/MPI 2007).

A significant proportion of expenditure on the Italian school system is invested in a large number of teaching hours (the highest across all OECD countries) and a very low pupil-teacher ratio. The fact that this expenditure is at least average, if not above average, seen internationally, gives rise to doubts about the efficiency of the system and the adequate distribution of resources. As far as the teaching staffs are concerned, they are relatively poorly paid, and their teaching commitment is relatively low. Salaries are not performance-related, but rise in line with the number of years' service.

Although discussions on quality that have taken place in varying degrees of intensity since the 1990s have brought about some innovation, there is still no effective system of quality assurance operating at national level. Greater rights of autonomy introduced in 2001/2002 and the extended leeway afforded to school have not yet been embedded in a national system of standards, of continuous external evaluation, of comparative data, or of support. The National Institute for the Evaluation of Schooling and Vocational Education (*Istituto nazionale per la valutazione del sistema educativo di istruzione e di formazione, INVALSI*) was assigned the task of establishing such a national system. To date, it has been primarily focused on looking at the national final examinations (*esame di stato*) and is only slowly beginning to embrace its role. In terms of internal quality development, schools are obliged to compile a school program (*piano dell'offerta formativa, POF*). However, as this only has to satisfy minor demands, it is often really only effective as a development instrument. Some schools, mainly in the north, have used their own initiative to carry out their own internal evaluation measures. Sometimes this has also received support from regional school authorities.

The Italian public has only been marginally interested in the results of international studies, if at all. The competent ministry did not even hold a press conference when the results of the first PISA study were published (Nardi 2004). A so-called *White Paper* of schools was first published in September 2007 at the behest of, and with the collaboration of, the Ministry of Education and Science. For the first time,

a committee of experts conducted a comprehensive analysis of the shortcomings in quality in the Italian education system, highlighted by international studies and made substantiated proposals for improvement. In addition to pressing for national standards and a national evaluation system to be established, the paper issued a reminder to focus more on the organization of work, on recruitment and rewarding practices, and on in-service teacher training (MEF/MPI 2007). Despite a renewed change of government, the first projects and measures have been initiated, signaling a clear awareness of, and a fundamental willingness to tackle, the necessary steps described in the White Paper.

24.4.3 Dealing with Special Problems

Since 2008/2009, Italy's secondary school pupils have been subject to a new charter of rights and duties (*statuto delle studentesse e degli studenti*) in daily school life. Changes to the charter were motivated by a perceived increase in bullying, the lack of discipline exhibited by many pupils, and the feeling that not enough was being done to counter this trend. While on the one hand, documented unacceptable behavior is to be countered using tougher yet reasonable sanctions, on the other, endeavors encapsulated in an education and upbringing pact aim at making families more sensitive to, and responsible for, the upbringing of their children. Disciplinary measures are to be seen as educational, ranging from a chance to put wrongs right by doing something for the good of the school community through to the option of suspending pupils from school for days or weeks or even until the end of the school year. Each misbehavior sanctioned is recorded in a type of personal rap sheet. This is part of the pupil's file that accompanies him or her even when he or she changes schools. Another measure to counter bullying and misbehavior includes the option of actually grading pupil behavior as unsatisfactory which may lead to the pupil having to repeat the school year (DM 2009).

A serious problem the Italian education system has had to deal with over a number of years concerns the high rate of pupils leaving school early. Although the rate of *dispersione scolastica* fell from 25.3 % in 2000 to 20.8 % in 2006, this still clearly exceeds the EU average (15.3 %) and is still far away from the EU's Lisbon guideline for early leavers of no more than 10 %. In 2006, regional differences ranged from 12.8 % in Basilicata to 31.4 % in Sicily thus reinforcing the differences between the north and the south of the country (MPI 2006/2007). One measure to support pupils at risk relates to the regional vocational education courses discussed above. These have been part of the national school system since 2003 and award state-recognized qualifications. However, more than half of pupils enrolled in such courses can be found in just three northern regions; in other regions the provision of such courses is only marginal at best (ISFOL 2006).

A possible indicator to identify pupils at risk of leaving school early relates to statistics on repeaters: In 2006/2007 6.3 % of pupils in upper secondary school education had repeated a year, and 27.3 % of pupils pass their advance school leaving certificate later than expected (MPI 2006/2007). Pupils underachieving in

one or more subjects have to be provided with additional support lessons, if necessary at the end of the school year, during the holidays. Prior to the start of the new school year, pupils are again tested. If they do not pass they will have to repeat the school year (DM 2007).

24.4.4 Measure to Integrate Pupils from Immigrant Families

The number of pupils from a non-Italian background has risen severely in the last ten years. In 2007/2008, 6.4 % of pupils were not Italian. This growth affects all types of school, with the proportion in the upper level of secondary education (4.3 %) being significantly lower than in primary school (7.7 %). Most children from immigrant families live in the north of Italy (Emilia-Romagna 11.8 %), while the proportion living in south is relatively small (Campania 1.2 %). The largest proportion of pupils from non-Italian backgrounds – 29.8 % – comes from non-European countries (15.6 % of which come from Albania), 24 % come from Africa, 19.4 % from EU countries (13.7 % of which comes from Romania), 14.3 % from Asia, and 11.4 % from the Americas.

All children on Italian soil – whether legally or illegally – are included in the compulsory education system, just as children with Italian citizenship. All immigrants holding a residence permit are entitled to draw on all the services within the Italian education system, including universities. Despite the integration assistance envisaged in theory, pupils from a non-Italian background are severely disadvantaged in the education system. This is not only a question of language but also of social integration. In primary schools, 21.3 % of pupils from a non-Italian background are in classes below their age group (2 % of Italian pupils). In the upper level of secondary education, the figure rises to 71.8 % (24.4 % of Italian pupils) (MIUR 2008). At upper secondary school level, 1.9 % of the grammar school population is made up of pupils of immigrant families; the largest proportion is found in vocational colleges (8.7 %) (MPI 2008).

24.5 New Developments

For decades, experts have been discussing the *licei*-isation of the Italian education system, referring to the tendency across all forms of upper level of secondary education to draw heavily on the most popular school form, grammar schools (*licei*), when contemplating content and methodology. Since 1969, all schools at the upper level of secondary education provide university entrance qualifications. This means that the curricula of all schools, including vocational-oriented schools, focus on the teaching of general subjects and study skills. On the one hand, this is an obvious attempt to address the wishes of Italian families; on the other hand, this trend might explain some of the ongoing problems inherent in the education system. The system does not seem to have managed to motivate young people, as the high numbers of early school leavers would indicate. Regional vocational centers are an

attempt to provide such young people with a qualification. However, this liceisation of the education system does not seem to reflect social or business needs, and representatives from industry are increasingly complaining about the shortage of well-trained specialists and the limited practical experience of pupils (Gentile 2006). It is also striking how little companies in Italy are involved in vocational education, keeping a low profile when it comes to assuming responsibility (both in terms of content and providing financial support). A good example of this is the Italian model of apprenticeships (*apprendistato*): although it is highly subsidized, up until 2013 it did not need to satisfy any quality demands (ISFOL 2006).

For a long time, one of the reasons for the weak and low appeal of vocational education in Italy was surely the unclear division of competence. Although the regions are responsible for vocational education (*formazione professionale*), in terms of pure numbers, most pupils attend two types of school that actually fall within in the state system, the *istruzione professionale*, or school-based training. Only since 2007 has this problem – the unclear division of competence between national and regional authorities – been seriously addressed jointly in numerous task forces and coordination processes. In 2010, these consultations ended in defining minimum standards for a number of new vocational fields, in strengthening regional vocational education by creating new courses, and in providing greater influence on the curricula of state-run schools. Vocational courses at state schools with vocational subjects (*istituti tecnici* und *istituti professionali*) were rigorously purged and reduced from several hundred vocations to a manageable 17! Furthermore, the extremely high number of taught hours per week was cut while increasing flexible quotients for individual schools. One of the side effects of the reforms, and one certainly in the mind of the government when reforms were proposed, was the considerable financial savings. It remains to be seen just how these 20 regions fill these new programs with life. In the past, it was always the more northerly regions – perhaps also because of their financial clout – that have known how to make the most of the options made available to them to shape educational offerings.

Given the political instability of Italy, there was always little reason to be optimistic about expecting profound improvement in the quality of the education system. None of the reforms of the past few years has gone beyond generating isolated innovation efforts to systematically investigate the actual cause of disastrous school achievement, the many early school leavers and the huge differences in quality between regions and schools, and to bring about significant change. To date, practically no reform has impacted the core of the current system with its heavy theoretical teacher-up-front style of teaching delivered by poorly trained teachers across all types of upper level of secondary education.

Plans were launched to establish a system of education standards and external evaluation more than 15 years ago, yet to date this is still not fully functional. Particularly alarming is the fact that although PISA made public that conditions at some schools and regions must be abysmal, there is still no nationwide system of inspection and development. Measures undertaken so far are a step on the right direction but are mere island solutions, not part of an overall concept that tackles the root cause of prevailing problems.

In this connection, the neglected field of empirical educational research on test developments mentioned in the White Paper of 2007 is still a major issue. The White Paper also drew attention to the significance of establishing an academic skill center in addition to the National Institute for the Evaluation of the Schooling and Vocational Education set up to carry out external evaluation (MEF/MPI 2007).

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L. Dragidella (✉)

University of Prishtina, Prishtina, Republic of Kosovo

25.1 History and Social Parameters of the Education System

25.1.1 Cornerstones of Historical Development

To date, Kosovo has never been an independent nation; it has always been part of another empire or state, whether that be Byzantine, Serbian, Ottoman, or Yugoslavian, or again the Serbian state. However, until 1989, it did enjoy autonomy status within Yugoslavia. There was only ever an independent Kosovar education policy in an underground political sense or in exile in European countries that competed with the official dominating Yugoslavian or later Serbian education system until 1999. The antagonism between the Albanian majority and the Serbian minority that occasionally expressed itself in nationalistic conflicts has impacted the Kosovar education system to today.

25.1.2 Political, Economic, and Cultural Framework of the Current Education System

The problems inherent in the Kosovar education system can only be appreciated given an understanding of its political, economic, and especially the sociocultural framework. Of the 2.1 million population living in Kosovo, 88 % are Albanians, 7 % are Serbs, and 5 % are of other ethnic groups (Kosovo Agency of Statistics 2008). Prior to 1970, about two-thirds of the population were Albanians, just short of one-quarter were Serbs, and roughly one-tenth belonged to other minorities. Demographically, the Kosovars are the youngest people in Europe: one-third is under 15 and more than half is under 25 (Kosovo Agency of Statistics 2008). This is due to a birth rate that is well in excess of the death rate.

Economically, the Kosovars live mainly from agriculture, cattle breeding, and wine, in addition to small companies and cooperatives in the retailing and construction sectors. Unemployment is very high – at 40 %. Among young people, unemployment can reach up to 60 %. This might explain why many Kosovars live abroad. The ethnic minorities of Roma, Ashkali, and Balkan Egyptians, as well as the Albanians themselves, are particularly hit by poverty. Less so affected are the remaining Serbs. The unemployment among Serbs is “only” 20 % and they are well represented as public (national) and municipal civil servants (UNDP 2005, p. 31).

For the education sector, this data means that there are many children and young people who are educated and/or who want to be trained for whom there are few educational facilities or training positions. In addition, there is a very high rate of illiteracy among women. This gap is, however, narrowing. Moreover, the various languages and religions need to be integrated into the education system which is proving difficult given the uncertain situation regarding international law as is the case with Kosovo still under UN/EU administration. As the forms of ethnic

oppression have reversed since 1999 and given the new signs of nationalistic conflict – especially in northern Kosovo – the project of establishing a uniform education system is virtually impossible. And finally, the war led to many school buildings being destroyed.

25.2 Fundamentals, Organization, and Governance of the Education System

25.2.1 Current Educational Policy and Goals of the Education System

Following the declaration of independence in February 2008, independent educational goals have been set. The region is striving to adopt EU educational policies and their ISCED 97 standards. In 1999, the Ministry of Education, Technology and Science divided its educational policy in two phases – the emergency phase (up to 2002) and the development phase (from 2003). In the first phase, top priority was given to reconstructing the school infrastructure destroyed in the war. Initial steps were taken toward introducing an education reform that embraced the following aims:

- To develop a new framework curriculum for Kosovo
- To develop and introduce a new structure for the education system
- To pass a law governing primary and secondary education
- To develop a law governing higher education
- To prepare and introduce administrative instructions, regulations, and guidelines
- To devise an education strategy for Kosovo for 2002–2007

Much was done after 2002, in particular with respect to the laws.

25.2.2 Legal Framework

Much of the legal basis for the education system was passed between 2002 and 2011. This includes:

1. Law on Primary and Secondary Education (2011, 04/L37)
2. Law on Higher Education in the Republic of Kosovo (2011)
3. Law of Adult Education (2002/L-24)
4. Law of Preschool Education (2002/L-52)
5. Law on Publishing School Textbooks, Educational Teaching Resources, Reading Materials and Pedagogical Documentation (2002 02/L-67)
6. Law on Final Examinations and State Matura Examinations (2008, 03/L-018)
7. Law on Scientific Research Activities (2004 04/L-135)

25.2.3 Governance of the Education System

The UNMIK is gradually transferring its responsibilities to Kosovar institutions. Since 2008 and the declaration of independence, all responsibilities for education have been transferred to Kosovar institutions. Moreover, the Law of Education in the Municipalities (2003 03/L-068) defines how municipalities are to organize all levels of education. There is a lot of catching up to do particularly in the kindergarten sector. To date, these have not been established in rural areas (Kaiser 2000, p. 3). The law is a little unclear on the question of quality control and the manner of reporting the state of educational facilities, delegating responsibility to a person the mayor thinks is competent enough (Article 6c). The Law on Inspection of Education in Kosovo (No. 2004/37) defines the rights and duties of educational inspectors the Ministry of Education deploys. They can inspect educational facilities and withhold licenses in the event of infringements or should teachers/schools exhibit insufficient skills. However, very much of the Kosovar education system still finds itself involved in projects, whether these be initiated by the EU, the German Society for International Cooperation (GIZ), or a charitable organization such as Caritas (Kaiser 2000; GTZ 2005, 2007) or the EU's Tempus program.

25.2.4 Funding the Education System

The difficulty in acquiring any sort of figures makes it difficult to make any statement on the funding of the education system. In view of the precarious economic situation and the legal uncertainties on the political status of Kosovo, it has to be assumed that a large part of the education system is funded by external donors, i.e., the EU, the UN, or the World Bank, and NGOs. Of the 37 million euros invested in vocational education in 2002–2004, 82 % was borne by international donors (more than half alone by the EU) (European Training Foundation 2006, p. 12). The Department of Education and Science at the UNMIK donates monies to the larger municipalities for them to administer together with school head teachers and school committees (Ministry of Education, Science and Technology 2002).

25.2.5 Relationship Between the Public and Private Sectors

The education system in Kosovo is dependent on external sponsors who fund public schooling and vocational education. But there are also some private schools that are maintained through monies from aid organizations. The 24 private universities founded by investors appear – according to Austrian education researcher Johann Günther (cited in Wehrschütz 2007) – not so much on an educational mission as good business, made all the easier given the lack of a legal framework. Financially, the Kosovar education system is dependent on the generosity of international

financial sources or partially on dubious private investors who are trying to relieve education-hungry Kosovars of a great deal of money.

25.3 Overview of the Structure of the Education System

25.3.1 Pre-primary Education, Early Education, and Care

Early education in Kosovo is divided into kindergarten and pre-primary education. Generally, Kosovo educators have used the term “pre-primary” to refer to the preparation class in primary school. As a result of the education reform, from 2000 to 2001, this class was attended by pupils aged between 5 and 6 years. In Kosovo, the term “kindergarten” has been used to refer to full day-care services for children from 9 months to 7 years and, since September 2001, to 6 years of age. Before the 1998–1999 conflict, only a small minority of children had access to preschool education. Despite initial reforms in this area, only little has changed.

In 2013/2014, there were a total of 42 public kindergartens in Kosovo attended by 26,768 children. Of these, only 4,811 children were younger than 5 years, while 21,957 (82 %) were between 5 and 6 years old (Kosovo Agency of Statistics 2014). The largely female educators looked after an average of 24 children. Half of the kindergartens were located in four larger municipalities: Pristina (8), Gjakova (7), Istog (5), and Gjilan (3). However, in Pristina, Prizren, and Peja, there are ten private kindergartens in which the proportion of children under four is much bigger. More than half on children under four can be found in the three private kindergartens in Peja (Kosovo Agency of Statistics 2011). Albanians make up 97.5 % of all children in preschool education; Serbian children only go to kindergarten in Shtimi and Kamenica, and Bosnians mainly go to Prizren and Peja, Roma in Gjakova and Peja, Turks in Pristina and Prizren, and Gorani in Dragashi. The proportion of Ashkali children is relatively high (0.67 %) compared to children from other minorities. In private kindergartens, 94.6 % of children are Albanian and 2.3 % are Bosnian. Here, kindergarten teachers only look after half as many children as in public kindergartens.

25.3.2 Primary and Lower Secondary Level

In 2000/2001, compulsory education was extended to 9 years and divided into primary (ages 6–10 years) and lower secondary education (ages 11–15 years). After year 9, there are internal tests, upon completion of which pupils are awarded school leaving certificates. Afterwards, pupils can either pursue a vocational education or change to the upper secondary school.

Lessons are still strongly shaped from the time of the parallel education system the Albanians practiced in the 1990s in underground. There is still a strong

emphasis on Albanian nationalism and teachers are still not adequately trained. They are also very poorly paid. Teaching methods are out of date: teacher-upfront styles and rote learning dominate. Educating responsible citizens and encouraging them to articulate their own opinion, group work, and discussion are practiced very little even though many books published by the Kosovo Education Center place a great deal of value on this. Overall, Kosovar schools are poorly equipped and crowded. In some schools, there is no water and no heating. Sometimes in winter, children are taught at temperatures of minus 15 °C. The large number of pupils means that classes have to be taught in a shift system.

25.3.3 Special Needs Schools

The Ministry of Education emphasizes a policy of inclusion in “regular” schools for children with special needs. The long-term objective is to include children with disabilities into regular schools and classes, rather than segregate them into special schools. This will be a long and difficult process; its implementation can only be done by means of a gradual, step-by-step approach. During the school year 2001/2002, only a very small percentage of children with disabilities attended school. According to the Kosovo Agency of Statistics, in 2013/2014, 375 primary school pupils and 260 lower secondary education pupils attended special schools or special classes in “regular” schools. Forty-one percent of these pupils were girls (Kosovo Agency of Statistics 2014, pp. 97–100). In total, 635 pupils were looked after by 131 teachers.

In Prizren, Peja, and Mitrovica, there are three special schools with 20 classes for the upper secondary school with a total of 169 pupils, nearly one-third of which are girls. The number of schools and classes that take in disabled children has become more widespread and is no longer focused on the five largest municipalities as was the case 5 years ago.

25.3.4 Upper Secondary Education

The upper level of secondary education in Kosovo lasts 4 years at a gymnasium-type school and 3 years at a vocational school. At both types of school, pupils can take the *Matura* examinations in both written and oral forms.

At the beginning of the education reforms in 2001/2002, over 90,000 pupils were enrolled in upper secondary education facilities; nearly 50 % of which were enrolled in vocational schools. Over 10 years later, the number of pupils had changed, with a clear shift in the distribution of pupils toward vocational schools taking place with now 56 % of pupils following the vocational track (Kosovo Agency of Statistics 2014, pp. 70–86). Altogether, there are 115 schools with 5,400 teachers and a teacher-pupil ratio of 1:19.2. Overall, 46.03 % of the young people attending upper secondary schools are girls, approximately 53 % of

whom attend gymnasium. This means that when girls pursue upper levels of education, they strive toward a place at university (see the section below on tertiary education) or at least want to keep this option open. At the same time, they are obviously better achievers at school, with girls far much more unlikely to repeat a year than boys.

The statistics relating to the ethnicity of pupils does not list any single school for Serbian pupils – which is also the case for the primary and lower secondary sectors. This is largely due to the fact that the Serbs who live in northern Kosovo are defying the region's authority and have established their own schools and administration which the Kosovar authorities do not recognize. Thus, the Serbs are relocating to municipalities in which they are the majority ethnic group: a parallel situation to that of the Albanians in the 1990s.

25.3.5 Tertiary Sector

The first faculties and institutions of higher education in Kosovo were founded between 1958 and 1969; they functioned either independently or within the University of Belgrade. When the University of Pristina was founded in November 1969, the Kosovo-Albanians had access to higher education in their mother tongue for the first time. It had four faculties: philosophy, law, engineering, and medicine. Today, it has 14 faculties and six colleges. The colleges offer courses of study that are more vocationally oriented than those of the faculties, and they are located in different parts of Kosovo and not only in the capital Pristina. In the meantime, there are 47,000 students at the university of which 49 % are women (studying in particular philosophy, philology, economics, education, and medicine). The student body comprises 98.3 % Albanians, 0.95 % Bosnians, and 0.67 % Turks. Most of the latter two groups study education, i.e., teacher training. There are also 13 students from other ethnic groups, half of which studies law. In principle, the goals of the Bologna Process also apply to this university. However, given the lack of equipment, the crowded lecture halls, and certain incompetencies on behalf of the teaching faculty (cf. student statements cited in Hofmann 2007), it is not surprising that these goals cannot seriously be implemented.

The faculties of metallurgy and technical science of the University of Pristina are located in the Albanian part of Mitrovica; a Serbian university was founded in the Serbian part in 2001. This has 14 faculties and 10,000 students and was recognized by UNMIK in 2007. In the meantime, there are efforts to intensify the contact between the Albanian and Serbian universities and their students. Thus, for example, in 2007, a summer camp took place at both universities in which students of different nationalities came together, learnt together, and spent time with each other (Hofmann 2007). Five other universities have since been founded (Prizren 2010, Peja 2012, and Gjilan, Mitrovica, and Gjakova in 2013). In addition to public universities, there are also 20 private colleges of higher education that can demand

tuition fees of up to 1,000 euros per semester. These private institutions house between 15,000 and 20,000 students (Wehrschütz 2007).

25.3.6 Adult Education

The main obstacle for economic development in Kosovo is the lack of qualified personnel and private investment in enterprises. Therefore, the Department of Labour and Employment in the UNMIK offers labor-market training. During the year 2000, different employment offices throughout Kosovo trained more than 10,000 jobseekers for different occupations. Computer and English courses were among the most frequented training schemes. Staff training is another common form of adult education that exists in Kosovo, especially within the public sector. This includes literacy courses for older women.

25.4 Developments in the Current School System

As described at the beginning of the chapter, the particular situation of the development of the school system in Kosovo is extremely sensitive. Two particular challenges should be highlighted.

25.4.1 Education for Minorities

The greatest challenge for the Kosovar education system is the education of minorities: on one hand, there is the politically sensitive issue of the Serbian enclave in northern Kosovo which has – similar to the situation of the Albanians during Serbian domination – built up a parallel education system. The first contact between the Serbian university in Mitrovica and the Albanian university in Pristina is a small step toward reconciliation. If the Albanian majority is serious about wanting to integrate the remaining Serbs in its territory and avoiding the political divisiveness between the peoples, then it must make a number of wholehearted concessions.

The same applies to the Roma, Ashkali, and Balkan Egyptians and less perhaps for the more integrated Turks, Bosnians, and Croatians. Most of all, language problems need to be addressed to be able on one hand to fill the rights of minorities provided for in the constitution with life and on the other hand to facilitate joint talks between the ethnic groups. The situation of the Roma is particularly precarious: they have never had lessons in Romani or Sinti in Kosovo which might be one of the reasons to explain their high rates of school absenteeism.

The approach of the German technical aid agency GTZ to link educational work with reconciliation and peacebuilding is especially important for minorities (GTZ 2005, 2007). This starts with the positive experience of the coexistence of the ethnic groups during the Yugoslavian past.

25.4.2 Attempts to Harmonize with EU Standards

The UNMIK, the EU, and the Ministry of Education in Kosovo are striving to gradually adapt the education system to meet EU standards. The ministry's emergency phase discussed above may well be closed in one sense that most of the war damage to buildings and facilities has been repaired. However, schools and universities still do not have sufficient space nor materials. There are some showcase projects initiated by public and private aid and political organizations: Austrian efforts have focused on establishing an academic middle management at universities and the German Konrad Adenauer Foundation on developing examination standards, evaluating examination results, and improving the collaboration between pupils and companies. However, all these good intentions are being exacerbated by the uncertain legal situation, the disastrous economic situation with its high unemployment, and the all too familiar Mafia-like structure of society in which it is not so much education and skills which facilitate social mobility but (family) relations.

25.5 New Developments

There have been some positive trends in the development of the education sector in Kosovo in recent years. The foundation for a new education system has been created, new curricula developed, teacher training expedited, education for the disabled advanced, and vocational training improved. Attempts have also been made to transfer the legal rights of minorities to the education sector – with initial success in respect of Turks and Bosnians. These developments have to continue to address the problems that still exist, whether these be improving the value of education in the eyes of people generally, demanding equal rights for women, breaking down the Mafia-like and questionable structures in society, and overcoming the political discord highlighted by nationalistic entrenched ways of thinking especially between Albanians and Serbs. Addressing these obstacles is not only essential with respect to education but also for the development of the society and economics in general.

The rapid establishment of public universities in Kosovo (five within just 2 years) that may have been a result of day-to-day, short-term political football may well bounce back with greater social consequences. At present, Kosovo does not have sufficient capacity to warrant opening up so many universities and it might be more worthwhile for public institutions to strengthen vocational education.

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I. Žogla (✉) • R. Andersone • E. Černova
University of Latvia, Riga, Latvia

26.1 History and Social Parameters of the Education System

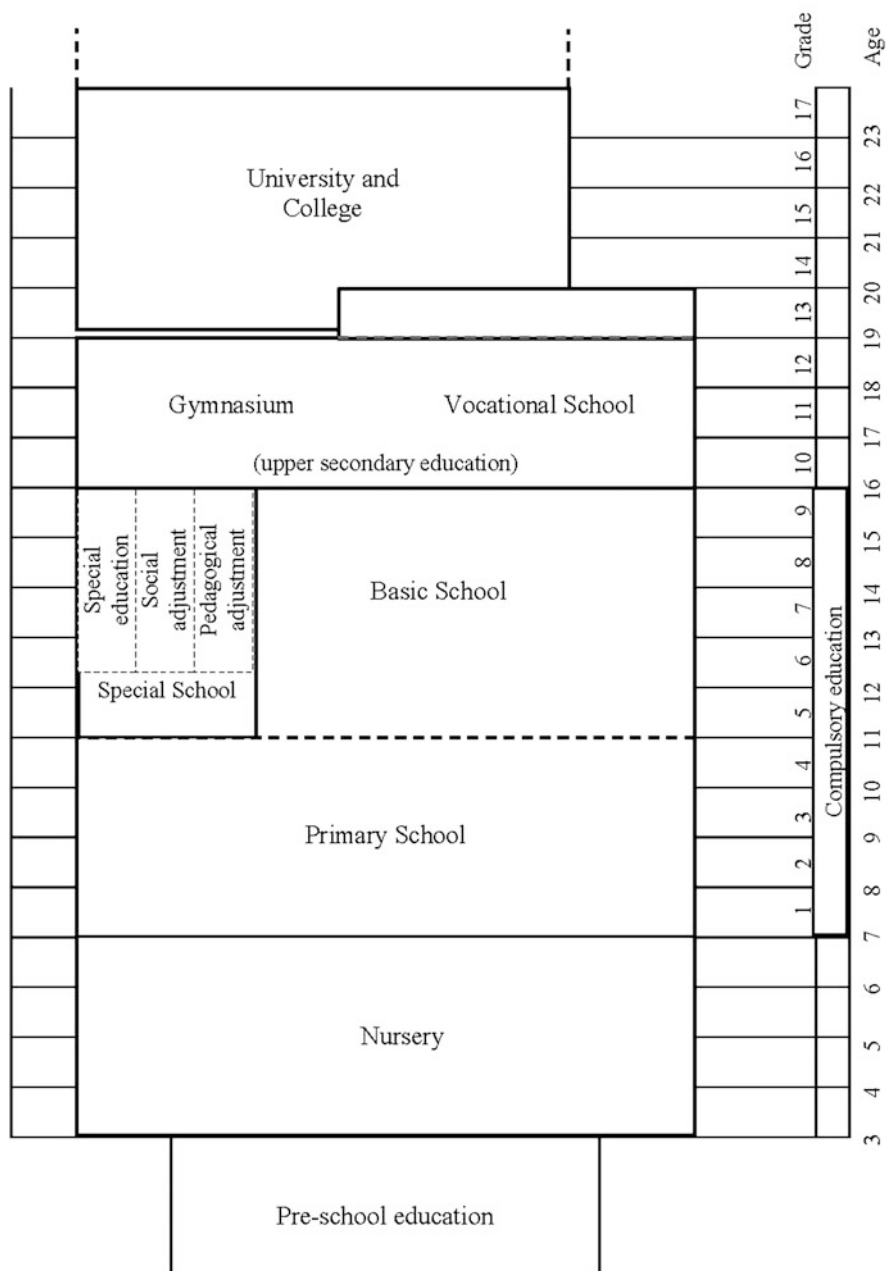
26.1.1 Key Historical Stages of the Development of Education System

The first schools in Latvia were opened in monasteries and churches: the Dome church school, for example, was founded in 1211. However, the first general schools for Latvian children were founded in the second half of the sixteenth century in Riga. The development of education in Latvia was substantially facilitated by the teacher seminaries founded in the nineteenth century, 1839 in Valmiera and 1840 in Irlava, where teachers received education for work in schools with Latvian as the language of instruction. From the second half of the nineteenth century, alongside German and Latvian schools, schools taught in Russian were opened, as well as a teacher seminary and a polytechnic. Many prominent cultural workers and writers in Latvia studied in Germany and at higher educational establishments in St. Petersburg and Moscow. In the second half of the nineteenth century, the movement of *New Latvians* began, characterized by the advocacy of the development of ethnic national culture and the Latvian language, which was manifested in the syllabus of educational institutions and the language of instruction. The influence of these educational institutions on the development of Latvia's culture increased considerably: according to the data of 1897 population census, 79.7 % of citizens in Latvia could read and write. From 1919, a unified system of general education in the mother tongue with a 6-year primary school and a 4-year secondary school was introduced. In the same year, the first university in Riga was opened with 3,000 students. After the Second World War, the education system in Latvia developed as a part of the Soviet system with unified principles and programs. At the end of the 1980s, 90 % of pupils, who had started their education in Year 1, obtained general secondary education. In the period of sociopolitical changes since 1991, compulsory secondary education has been reduced to 9 years.

26.1.2 Main Tendencies in the Education Reform During the Last 30 Years

The development of education system during the last three decades can be divided into three stages: Before the sociopolitical changes in 1991, the development of the education system in Latvia followed Soviet legislation and ideology. In the 1970s in the Soviet Union and also in Latvia, education reform and transition to the general compulsory secondary education had been initiated and almost completed before the collapse of the Soviet Union. Minor peculiarities regarding the concept of education remained in national traditions, and this democratic value had been highly appreciated and implemented as far as possible by schools of Latvia. In the course of the Soviet system, extracurricular institutions for children's

Latvia



technical and artistic creativity had been widely developed. The development of preschool education was a significant step of the Soviet system to meet parents' needs for education in kindergartens.

The development of the education system of Latvia as an independent state from 1991 changed fundamental principles as well as the direction of the developments. From 1990 until 1994, the main objective was the democratization and decentralization of education and depoliticization of educational content. Since 1993, systematic and goal-oriented changes in legislation have been made, especially to follow the conception of continuing further education. The rapid political and economic transition caused the collapse of the industrial and agricultural production. Low financial support of the educational reform has made the process complicated, slowing it down, and even reverting to a certain extent. The time allocated to introduce a new curriculum and prepare teachers for the paradigm shift was extremely short.

From 1995 until 2001, the education system was put in order by further considerable improvements in the legislation and regulatory basis: the *Law on Institutions of Higher Education*, improvements in the *Law on Education*, and the *Law on General and Vocational Education* were passed; the compatibility of the tertiary education with the European and global education systems was enabled. The *Concept of Educational Development (2002–2005)* envisaged continuing development of the education system: strengthening of the cooperation between the education policy-makers, local governments, educational institutions, the public, with parents in schools, and with employers especially in vocational education. The development of the educational system is aligned with the long-term economic development strategy, the national developmental plan, the current documents of the European Commission, the UNESCO Program *Education for All*, and other current documents. The central task of the education reform was by and large completed by 2013 and included the implementation of common education quality monitoring, quality criteria, and the system of assessment: cooperation between educational institutions in development planning, self-assessment and assessment of achievements, the implementation of internal controls, accreditation of institutions and training of the respective staff, obtaining and analysis of *OECD* data, etc. The Standards of General Basic and Secondary Education established the key targets for each stage of education, whereas the concepts of education and the implementation of the general educational principles are covered by the overall orientation of the education system programs. The majority of the key targets have been met:

- Compliance with the individuals' needs and the tendencies in the development of the society to improve the quality of education in each of the stages and to develop it in-line with the competitiveness in the labor market and the development of the national economy
- Involvement of the community in the development of the educational system
- Assurance of opportunities for lifelong education by coordinating the outcomes of education between the stages

- Succession in education reform through assessment of each stage in order to use it as the stepping-stone for the next stage in the development
- Supervision, self-assessment, and external evaluation in their unity

Some of the targets are still restricted mostly due to the economic and financial recession and planned achievements in the following areas are lacking behind:

- Availability of education to all members of the society at all levels is restricted by low household income
- Common coordination of management and innovation between various institutions by implementing integrity in the planning of changes
- Targeted establishment of the priorities in the development of the education system and commitment to a quality result
- Assurance of resources, cost-efficiency in the range of services offered by educational establishments of all types and stages

The most difficult task in the transition from a totalitarian, centralized, and ideological system to the development of a democratic, decentralized system for the free development of each individual at least during the first decade following the political change appeared to be the inability of teachers and the community to distinguish between the ideological postulates of the Soviet heritage in education on the one hand and the traditional national values to be preserved on the other. There was no reliable analytical reflection on how quality achieved could be obtained by preserving some experience of the previous system where it seemed reasonable. Essential documents for the education reform were borrowed from Western models and were uncritically integrated into national traditions and national system of values.

26.1.3 Sociopolitical Conditions for the Development of the Education System

Currently, Latvia has a population of slightly more than two million, 68 % of which reside in towns. The ethnic map of the population of Latvia exceeds 160 ethnic groups: 62.1 % Latvians, 26.9 % Russians, 3.3 % Belorussians, 2.2 % Ukrainians, 2.1 % Poles, 1.2 % Lithuanians, and 2.2 % other. The largest religious communities are the Lutheran Protestant, Roman Catholic, and Greek Orthodox churches. The language most used at home is Latvian, 62.1 % of the population, and the second most popular language is Russian, which is spoken by 37.2 % of the population.

Nearly 24 % of the population have completed higher education, 30.2 % vocational secondary education, and 23.8 % general secondary education. The highest percentage of persons with higher education is in Riga and its metropolitan region (31.4 %). Males and females have equal rights to obtain education at all levels. Higher education and the PhD degree seem to be the prerogative of women with the number of female graduates now reaching 64.4 %. Differences are less pronounced

at the other levels of education, except the teaching profession where females continuously account for 80–90 % of the staff.

The gross domestic product in Latvia per capita is approximately 14,008\$ (2012), and the unemployment rate is 15.4 % (currently decreasing); 13.2 % of the unemployed have a degree, 32.6 % general secondary education (2013). The prestige and salaries of teachers are not particularly high in the state sector. During the last few years, a shortage of teachers can be observed in several subjects, including sciences and mathematics. For this reason, the average age of teachers is increasing (retired teachers are continuing to work to fill in the vacancies), and a considerable number of the tertiary graduates are seeking employment outside the country.

26.2 Fundamentals, Organization, and Governance of the Education System

26.2.1 General Education

The *National Standard of the General Compulsory Education* is mandatory for all developers and implementers of the general educational programs. It establishes the key aims and objectives, the mandatory content, including the mandatory subjects and their standards, as well as the fundamental principles of, and the procedures for, the assessment of the educational outcomes and the mandatory national tests. The schedule of the tests for the current academic year is established by the Cabinet. The Ministry of Education and Science develops sample general education programs. Educational institutions offer only licensed programs. The subject curriculum can be developed by the teacher or selected from the sample subject curricula offered by the Ministry of Education and Science. Accreditation of education programs is regulated by the Cabinet for 2 or 6 years and at least once every 6 years. Accreditation of the programs of general education is conducted by the State Agency for Assessment of Quality of General Education. The preparatory year (aged 6–7 years) and primary (9 years) education are mandatory. In 2013, there were 212,433 pupils who attended six types of comprehensive schools.

Type of school	Number of schools	Number of pupils %
Full-time day schools, total	807	94 %
Primary schools, elementary schools, stage 1	48	2.2 %
Elementary schools, stage 2	337	22.75 %
Secondary schools	361	66.78 %
Special schools	61	3.35 %
Part-time, evening (shift) schools	34	4.9 %

In 2012/2013, there were 69 education and training institutions where programs of general education are implemented in a part-time form. In Riga, there is also a secondary school for distance learning. A significant number of pupils in

mainstream schools learn foreign languages. In 2012/2013, three and four foreign languages are acquired by 2.9 %, two languages by 40.5 % of the total number of Year 1 to Year 12 pupils, and one foreign language by 41.6 %. The most popular languages that are delivered in schools are English (83.2 %), Russian (33.7 %), and German (11.4 %). There are also classes of French, Spanish, Latin, Swedish, Polish, Norwegian, Danish, Finnish, Hebrew, Chinese, Japanese, Estonian, and Italian. In 2012, 60.8 % of basic school leavers continue learning in secondary schools, 33.8 % in vocational training institutions, while 5.4 % do not continue formal learning. Conversely, 62.8 % secondary school graduates continue learning at universities and colleges, 6.4 % in vocational schools, while 30.8 % do not continue studies.

The impact on education of the last economic and financial recession, accompanied by severe financial cuts for education, is dramatic. Parallel to this, since 2000, there is a sharp decrease in the number of students. According to Eurostat data, during the period between 2000 and 2009, the number of students per teacher in Latvia decreased from 18 to 11 and to 10.3 – in 2011. (<http://appsso.eurostat.ec.europa.eu/nui>) Therefore the number of teachers has decreased accordingly, and small country schools had been closed. The teachers are aging: only 7 % of teachers are of age 30 and younger, while more than 40 % of teachers are over the age of 50.

The official language is Latvian. It is common for the majority of the population and also the language of instruction in 72.1 % of all schools. The second most widely used language of instruction is Russian (27.01 %). Education can be acquired in another language in private educational establishments or in state, and local government educational institutions if minority education programs are implemented in them. Anyone acquiring basic education or secondary education in another language also simultaneously acquires and takes the examination in the Latvian language. Papers required to receive the universities degrees are prepared and defended in Latvian, except as otherwise stated in the legislation.

There are non-university higher education institutions and universities. Both are accredited following the procedures established by the state and offer licensed or accredited programs. Institutions of higher education and universities offer programs for the further education according to their profile and the qualifications of their lecturers.

The Law on Education (1998) established the concept of education and the guidelines, defines the acquisition of education of all types and stages, and establishes the fundamental principles of the system and the competence of the management bodies. Several subordinated laws are based on it. All of them have been supplemented and amended several times.

The management of the education system is organized at national, municipal/regional, and institutional level. The State Parliament (Saeima), the Cabinet of Ministers, and the Ministry of Education and Science are the policy-makers and the decision-makers at national level. The Ministry of Education and Science issues licenses to open educational institutions and assures the development of educational standards, alignment of content with the Constitution, and the Law on Education. Educational institutions are accredited by state agencies. Decisions regarding the

implementation of the law on education and national standards in the region are taken by the local bodies and the educational institutions. The latter are entitled to develop programs (licensed and accredited following the procedures established in the state) and study aids.

26.2.2 Financing and Its Infrastructure

The allocation of financial resources to education is organized in the state budget: in 2012/2013, this amounted to more than 915 million € or 5.01 % of the GDP. There are also contributions of individuals and institutions, EU structural foundations, donations, income from economic and scientific activity, and other legal funds. Since 1999, a project, financed by the World Bank, allocates funds for the improvement of cost efficiency and quality in education, the development of educational standards, programs, examinations, and school evaluation systems.

Of the total number of 807 general schools in 2012/2013, 764 were run by local bodies, 2 were state schools, and 41 were private school, financed by the state, local budget, or private owners. The educational institutions run by the state are financed from the state budget in accordance with the provisions of the current *Law on the State Budget*, but the local governments maintain the educational institutions from the local budgets. Private educational establishments are financed by their founders, but the state and the local government also participate. Funding from the state budget is considerably lower in the educational institutions established by legal entities and individuals. Low teacher salaries, state requirements for education, and professional qualifications mean that educational institutions are underfinanced. In addressing this problem, educational institutions use a variety of techniques to attract more funding. In some regions, the so-called density ratio corrects teachers' salaries according to the number of learners per class. Salaries are also higher in the big cities where living expenses are higher than in rural areas.

Since 2008/2009, the average teacher's work load was 21 lessons per week. The average teacher- learner ratio was 1 to 8 in rural areas, and 1 to 10.2 in urban areas. This proportion is however influenced by the ongoing decrease in the numbers of children; in 2012/2013, this ratio also decreased: in rural areas to 7.1, in urban areas to 9.9 learners. There are areas and municipalities which are not able to sustain the number of learners and also the teachers' salaries. For economic reasons, 58 educational institutions were closed and 85 merged and reorganized. The model money-follows-the-learner caused unequal distribution of salaries for the same load and further negatively impacted the proportion of teachers and learners in different regions. To preserve the staff and at least a minimum salary in rural areas, the teachers' work load has been increased. Small schools are becoming multifunctional cultural centers for community with many additional services besides the traditional function of teaching-learning. This initiative, leading to sustaining school numbers, is widely supported by the local authorities.

The costs of preschool, primary, and secondary education at state or local government institutions are covered by the state and local governments.

Preschool educational institutions, primary schools, and secondary schools are governed by the local bodies. As the founders, they are responsible for the financing of these institutions (teacher, administrative and technical staff salaries, study materials, building maintenance, and public services). The funds of the state budget are used for the salaries of the teachers who provide the mandatory preschool education to children aged 5–6 years. Parents cover the expenses related to school meals and partly the maintenance of kindergartens. Also the state provides the financing for children with special needs, boarding schools, and social adjustment schools and classes. Students in tertiary education can receive a state loan. Tuition fees in various higher educational establishments and study programs vary greatly, between 280€ and 3,500€ per year in state higher educational establishments and between 70€ and 1,529€ in higher educational institutions founded by legal entities. The average tuition fee charged in state higher educational facilities for full-time basic studies in year 2007 was 760€.

In 2011, the total funding of tertiary education was 0.5 % of the state budget, and it comprises 84 % of financing of higher educational establishments and colleges; 16 % are founded by legal entities. The majority of compulsory schools (764 schools in 2012/2013) are run and financed by the local bodies. In 2012, 2 schools were run by the state, and 41 were private schools.

26.2.3 Quality Monitoring and Assurance System

The quality monitoring and assurance system is coordinated by the State Education Quality Service. Self-evaluation and external evaluation of all stages of education are organized in-line with the methodology developed by the Education System Development Project. The process and results of external evaluation are analyzed regularly, and the information obtained is used to improve the education policy and to plan the development of educational institutions. Quality assessment agencies have been established for the organization of external evaluation, licensing and accreditation, as well as for attestation of school management. The quality of the work of educational establishments and the achievements of pupils are regularly evaluated according to internationally recognized systems which assures the overall evaluation of the system and its integration in the European Union. The education quality assurance plan 2007–2013 develops an institutional mechanism which leads to including Latvia in the *OECD* data analysis and its participation in international comparative quality surveys as well as to the study of the developmental trends according to the internationally comparable indicators of education. Assessment of the impacts of the common education quality evaluation system is currently not yet feasible. The development of common school operation quality evaluation system has slowed down because of low funding within the Education System Development Project. Nevertheless, the experience acquired and the results of the initial effort can be used to develop quality evaluation systems also in other stages of education.

26.3 Overview of the Structure of the Education System

26.3.1 Preschool Education: ISCED-0

Local governments provide preschool education facilities. In private preschool education establishments, the local governments finance staff salaries. School year starts on 1 September and normally lasts 35 weeks, until May 31. Nurseries accept children up to the age of 36 months, and preschool educational establishments accept children from 36 months of age. Places in kindergartens are provided mainly for 3-year-old children, and in 2013, 85.4 % of the age cohort attended in kindergartens. Currently kindergartens employ 9,900 teachers and nursing staff, and only 47 of them are male teachers. In 2012/2013, there were 605 kindergartens including 40 for children with special needs, attended by 79,384 children. The languages of instruction in kindergartens depend on the parents' choice: Latvian (424 or 75 % of all kindergartens), Russian (85 or 23 %), other minorities (0.5 %). There are 94 bilingual kindergartens with Russian and Latvian languages and 1 with Russian and Polish languages. Preschool children are being prepared for school already from the moment the child starts attending a kindergarten. Five-year-old children (98 % of the age group) join the compulsory preschool program. The rest are prepared by schools or centers of non-formal education which are obliged to cover the state program and meet the quality criteria of preschool education. The preschool education program is attended by children up to 7 years of age. Attendance may, if necessary, be extended by 1 year based on the parents' request and the report compiled by the respective medical commission. The number of immigrant children currently in kindergartens is comparatively small; all children whose parents have applied for a kindergarten receive the necessary support.

Since 2002, when a new provision of the *Law on Education* became effective, the preparation of 5- and 6-year-old children for school is mandatory; kindergartens and schools or educational centers which implement this program are listed in the Registry of Educational Institutions and have licensed pre-school educational programmes, trained teachers, and the necessary material resources. The preschool education program for children with special needs is implemented at the specialized kindergartens or children groups.

26.3.2 Primary Education: ISCED-1

Children attend the basic education program in the year they turn 7 and continue until the age of 16 years. In special cases, the acquisition of the basic education may extend until the age of 18 years. The basic education is mandatory in Latvia and lasts 9 years. The full program of 9-year compulsory education is implemented by primary schools (*sākumskola*, Years 1–4) and basic schools (*pamatskola*, Years 6–9). In Year 1, the knowledge and skills acquired by children are not scored but are evaluated in descriptive terms. Transfer to the ten-point evaluation system starts gradually in Years 2–4: in Year 2, scores are given in mathematics, the Latvian

language, and the minority language and in Year 4, also in sciences. Children of all minority schools acquire the Latvian language and a foreign language. The most widespread is English, followed by German, Russian, French, Polish, Hebrew, and Estonian. Each school providing compulsory general education may implement one or several licensed programs, including programs for the ethnic minorities.

26.3.3 Lower Secondary Education: ISCED-2

The second stage of basic education from Year 6 to Year 9 is mandatory, and pupils with special needs go to these schools if their special needs can be satisfied in the school. The basic education may also be implemented by vocational school, special schools, evening (shift) schools, boarding schools, social or pedagogical adjustment schools or classes, as well as by another educational institution if it offers full or part of the basic education program. The content of studies is established by the National Standard. The Ministry of Education and Science monitors the quality of studies and establishes the content of the national final examinations. Starting from Year 5, the knowledge and skills acquired in all subjects are evaluated on a scale of ten points. Upon completion of primary education, pupils take centralized examinations whose number and content are fixed by the Ministry of Education and Science. The pupils having received the annual assessment in all subjects of the basic education program and assessments in the national tests receive the certificate of basic education and the study record.

The learners' achievements in the subjects including the centralized examination are reflected in a ten-score system in the supplement of the certificate of the basic education. This document entitles pupils to proceed to any medium-stage educational program. Pupils who have not passed the final test in any subject receive the school report which confirms the subjects completed and their scores. The school report entitles pupils to apply for vocational basic educational programs.

There are three types of special school education: special education, social adjustment, and pedagogical adjustment. Special education is a special type of general education. Article 1 of the *Law on Education* defines the circle of individuals to whom special education applies as those who need education in view of their health condition, abilities, and level of development at any educational establishment, simultaneously assuring pedagogical, psychological and medical adjustment, preparation for employment, and life within the society. The focus of teaching is oriented on the acquisition of practical skills and social integration. In 2012/2013, there were 61 special schools attended by 7,916 learners; 68 learners were enrolled in evening and distance learning programs. In addition to the special institutions is any educational institution entitled to license special education programs following the procedures established in the *Law on General Education*, provided they are able to assure adequate environment and qualified staff in order to assure the quality of education. The pupils who have attended special education programs receive the certificate of basic education or the certificate of secondary education and their study record. Social adjustment programs describe an education program which is

methodologically and organizationally aligned to individuals of mandatory education age with social-behavioral problems. In Latvia, such programs are implemented only at social adjustment educational facilities. They perform the functions of an institution of general education and implement social adjustment educational programs and programs for social reintegration and assure treatment for alcohol, drug or toxic substance addiction, and other conditions. Learners are encouraged to acquire the knowledge and skills necessary to lead an independent life in the society, and there are also opportunities for acquiring vocational skills.

26.3.4 Upper Secondary Education: ISCED-3

Pupils can attend upper secondary education which normally lasts 3 years provided they hold a legal document confirming that they have completed their basic education. Programs of general upper secondary education cover the four blocks of content of comprehensive knowledge; the humanities and social sciences; mathematics, technologies, and natural sciences; and vocationally oriented studies (art, music, business, sports). The education programs contain eight mandatory subjects; three to six additional mandatory subjects are added for each thematic block within the program. Depending on the needs of the pupils, the school may offer optional subjects or in-depth acquisition of some of the mandatory subjects. In the respective block the upper general secondary education, program may be combined with a national minority education program. Centralized examinations are mandatory upon the completion of the comprehensive secondary education program. The content of and procedures for the examinations are established by the Ministry of Education and Science and approved by the Cabinet of Ministers. The graduates take five centralized examinations. Of these, one is fixed by the Ministry of Education and Science, the second subject depends on the chosen track for in-depth learning, the third subject is chosen by the school, and two subjects are chosen by the pupil. The pupils who pass the national tests receive the certificate of general secondary education and the study record. The results in the subjects with the centralized examination are reflected in the certificate of general secondary education. These documents entitle pupils to proceed to any higher-stage educational program. If the pupils have not received an assessment in a subject or any of the national tests, they receive the school report.

There are two types of programs in upper secondary education: general secondary and vocational secondary education programs. Methodological information centers have been set up at institutions of tertiary education in the regions of Latvia in order to provide assistance to teachers and pupils. Methodologies for natural sciences and technologies have been developed in accordance with the content of secondary education. A pool of test tasks has been created and can be used by schools. The implementation of the content of general secondary education and the centralized examination in mathematics in Year 12 has been prepared for implementation since 2008/2009. Quality monitoring systems have been developed and approved. In 2012, 62.8 % of all secondary school graduates enrolled in tertiary education and 6.4 % in vocational education. According to the data of the Ministry

of Education and Science, 30.8 % of secondary graduates do not continue their education, but it should be noted that schools do not have accurate information on the future choices of those graduates who have left the country.

The objective of vocational education is to provide opportunities for continuation of education after completion of the primary education or secondary school in order to receive initial vocational qualification, develop the skills for vocational further education, and be entitled to continue education on a higher level of education. Institutions of vocational education offer educational programs in all economic activities; their operation is regulated by the national standard of vocational education. Vocational schools offer education in three stages: basic vocational education, vocational secondary education, higher vocational education. It is possible to receive a five-stage vocational qualification. Level 1: basic vocational education is given to pupils who have completed Year 9 without the certificate or have not received basic education, as well as graduates of special schools. Level 2: vocational education is offered to pupils who have completed basic education or secondary education. Level 3: vocational education is offered to pupils who have completed general secondary or basic education and covers the theoretical fundamentals of the profession. Levels 4 and 5: the highest vocational education step opens access to the higher education programs.

Most of the schools offer 3- to 4-year courses and general secondary and Level 3 vocational education. Graduates receive the certificate of secondary education and the certificate of vocational education, respectively. Depending on the type of school and the acquired programs, graduates, after taking the final examinations and passing the qualification test, may receive the vocational education diploma. After the basic education, some schools offer basic vocational education only; with courses of 2–3 years, pupils receive Level 2 vocational education, receive the certificate of vocational basic education, and complete their basic general education. They may then proceed to 2–3-year programs and receive Level 3 vocational education. Vocational education programs end with five centralized examinations. Only the diploma of professional secondary education entitles pupils to continue to higher education or university vocational education programs. The number of institutions of vocational education has been decreasing during the global recession due to their optimization and to the decrease in the number of learners: in 2000/2001, there were 120 vocational institutions, in 2012/2013, only 65. Vocational educational institutions are run by different ministries, namely, the Ministry of Education and Science, the Ministry of Welfare, the Ministry of Culture, the Ministry of Domestic Affairs; they also are run by local authorities and private persons. Among students, the most popular subject areas are engineering, manufacturing, and construction, which attract 40.9 % of all learners as well as the service sector with 24.8 % of learners.

26.3.5 Post-secondary Education: ISCED-4

In-service training is offered which ranges between programs of 160 h (which may be part of the qualification) and 1–2-year programs oriented at development of

professional expertise and skills. The process of education and evaluation of the results of education are organized similarly to other vocational secondary education programs.

26.3.6 Institutions of Higher Education: ISCED-5

Tertiary institutions: They are divided into three groups: universities (run academic programs and research projects in several branches, have doctoral programs and councils for promotion in the main directions of their activities, more than 50 % of the academic staff hold scientific degrees), non-university tertiary institutions (run academic, mainly professional programs and research in several branches), and colleges. The programs of tertiary education consist of three groups: *academic* (normally 3-year bachelor, 2-year master; programs according to the law on tertiary institutions last not less than 5 years), *professional bachelor* (not less than 4 years – theoretical studies, practice, and research in the respective field; leads to the degree and professional qualification), and *professional* (not less than 4 years, practice-oriented, run by non-university institutions). There is no strict boundary between academic and professional programs. There are also two types of professional programs for the period of transition: professional tertiary educational programs with integrated bachelor standard and professional tertiary educational programs after the completed bachelor's program.

In 2012/2013, there were 58 tertiary institutions: 6 state universities, 13 state tertiary institutions, 17 state colleges which accounted for 69 % of all tertiary students, 13 private tertiary institutions, 7 colleges, and 2 branches of foreign universities. Enrolment in a tertiary institution is possible only if students have fully completed secondary general or vocational secondary education. Admission is conducted on a competitive basis, relying on the results in the centralized examinations. The university may establish additional requirements regarding special previous education, special suitability, and preparedness (e.g., in art, music, sports). The university informs potential students about the matriculation requirements at least 5 months before the enrolment.

During the last several years, the number of first level professional programs has been increasing across all kinds of tertiary educational institutions, and they enroll about 27 % of all students of this level. The first level tertiary programs lead to the fourth level diploma, and the second level tertiary education is recognized as equivalent to university education that leads to completed higher education and the right to be enrolled in a master's program. Studies in the bachelor programs last for 3–4 years and lead to bachelor's academic degree. Master's studies last for 1 or 2 years, depending on previous education: 1-year programs can be offered to master students who hold a bachelor diploma and a certificate for the 1–2 year professional education. Complete master's education and the diploma give the student the right to be enrolled into a 3–4-year doctor's program.

Students: The total number of students attending the institutions of tertiary education founded by the state and legal entities in Latvia in academic year 2012/2013 was 94,474 or 475 students per 10,000 inhabitants (in 2007/2008, there were 552 students per 10,000 inhabitants). During the recession, this number as well as the general population of the country decreased. In 2012, 62.8 % of the total number of secondary school leavers (in 2007: 77 %) entered the tertiary educational institutions; 36.9 % of them were financed by the state or local budgets. Overall there were more than 77,100 students or 82 % of the total number, in bachelor, professional, and combined programs; 69 % of them have entered the state universities, tertiary institutions, and colleges. 73 % of students were enrolled in full-time study programs.

The largest number of students is to be found in the fields of social and commercial sciences and law, and second is education. In 2012/2013 in the tertiary institutions of Latvia, there were enrolled 3,505 foreign citizens (most of them Germans and Russians), and 1,883 Latvian students studied abroad. There have been approximately 1,800 doctoral degree students in the last few years, and the trend is rising. Doctoral studies for a number of students have been supported by the EU foundation *Contribution to your future*, which has sustained the number of the doctoral students during the last few years. There are about 20 students per academic member of staff in universities and 25 students per academic member of staff in colleges.

The President's Office analyzed the quality and problems of Latvia's compatibility in the domestic and international labor market in 2011/2012. One of the conclusions is related to the system and quality of education – it deals with the thematic structure of education and the representation of content areas of the programs: the structures of the branches of sciences represented by the study programs do not match the demands for specialists in the economics and developmental tendencies of the country. There are a low number of students enrolled in sciences, technologies, and mathematics, with 13 % of all tertiary students, the lowest figure in Europe.

Adult and further education: To facilitate lifelong learning, three types of opportunity are offered for adult education in more than 6,000 programs at state and private tertiary institutions covering general, professional, and vocational education: formal (separate from work during the professional/academic studies or in combination with employment), non-formal, and informal education. This is supplemented by in-service training programs offered by tertiary institutions which constantly expand options mainly by developing e-format distance learning. Work-based further education is also provided especially by the biggest companies, for instance, banks, insurance companies, regional school boards, etc., which normally have specialized units dealing with organization of staff learning on regular basis. Educational policy urges the tertiary institutions to recognize wherever possible the documented achievements of non-formal education. Recognition also spreads over the students' achievements during their progress through education.

26.4 Developments in the Current School System

26.4.1 Transition Between Stages of Education

The legislation sets forth the main demands for the educational institutions to provide accessibility to the various stages of education. The programs of basic and secondary schools implement the standards; they are sequential and prepare the learners for further vocational or tertiary education. Centralized examinations complete the basic and secondary education. In September 2012, the Cabinet amended Regulations passed in 2008 on the state standard of the general secondary education and standards for school subjects, which changed the way results of centralized examinations are documented: starting in 2012/2013, learning achievements are reflected as a percentage and not a numerical score. In 2013, more than 24,000 graduates from secondary schools received their new certificate. The new content of general secondary education and the mandatory centralized examination in mathematics in Year 12 was introduced in 2008/2009.

26.4.2 Quality Measurements, Quality Management

A common general education quality evaluation system has been developed and is operating. The system envisages the use of the same criteria for self-evaluation and external evaluation of schools and tertiary institutions. A methodology for self-evaluation of the school has been developed; and the people involved in this process have been trained. According to a common national program, experts have been trained to perform external evaluation and approve the new methodology. Self-evaluation and external evaluation manuals are available at all schools. Methodological material for the evaluation of the national tests was developed and approved. A methodology for external evaluation of informal educational centers has also been introduced. The higher education quality evaluation system has been operating since 1996 and is continuously updated and improved in-line with the common EU guidance and in collaboration with employers. Attestation of tertiary programs takes place at least once in 6 years. One of the most essential tasks is to evaluate compliance of the higher education quality assurance system with the common European standards and guidelines approved in year 2005 and to make the necessary adjustments to update the guidelines and their practical implementation.

26.4.3 Some Special Issues

In 2012/2013, about 2 % of the school population repeat a school year. This amount has been stable for several years. Among the main reasons, schools cite unwarranted school absenteeism, low learning motivation, difficulties, and backwardness in the learning of some school subjects. In 2011/2012, municipalities completed an investigation of this phenomenon and obtained some figures which

prompted the necessary responses in teachers' work: 65 % of the pupils who repeat a school year are boys. Cabinet Regulations stipulate that pupils should not have to repeat years 1–4 and 10–12. Pupils who underachieve in only one school subject should be promoted to the next class and the required assistance provided. In all cases when a learner meets problems, assistance is provided in the form of extra classes. If this does not succeed, an individual assistance plan is compiled.

26.4.4 Integration of Migrants

In accordance with the national policy, the education of national minorities is provided in a planned manner: (1) a 3-year period for the development and introduction of the national minority education programs so that the pupils in basic education can learn in two languages (Latvian and their mother tongue) starting from 1 September 2012 and (2) a preparation period provides assistance so that 10-year-old children are able to learn at least five subjects in Latvian, gradually increasing to enable pupils to take national examinations in Latvian. Minority languages can be learned at private schools, where acquisition of the Latvian language is to be included in the programs. In collaboration with the Advisory Board on Ethnic Minority Education, the experts at the Ministry of Education and Science have prepared a support plan for the integration of the national minorities into a full-fledged education program by ensuring that at least 40 % of the subjects are learned in Latvian. National minority education programs envisage acquisition of the respective ethnic culture, history, and language.

26.5 New Developments

The general directions of educational development over the last 10 years denoted the main objectives for the improvement of the teachers' professional and in-service education. These included the mutual coordination of programs and content of educational reform, updating the standard of the teaching profession, and the introduction of measures to improve the accreditation of tertiary educational institutions and schools. Attention has been paid to the impact of the recession on education in general and teacher education in particular – financial cuts have led to constraints in the development of teachers' professional competences and opportunities for their in-service training. Insufficiencies at school management level have restricted the process of updating the content of education, compiling appropriate text books, and developing didactic materials for the learners and teachers. These general directions also draw teachers' and head teachers' attention to the need to prepare teachers to use the latest technologies and to develop cooperation among diverse communities.

In 2012, the parliament adopted the Latvian National Developmental Plan for 2014–2020. The chapter dealing with the development of skills formulates the main objectives of preparing high-quality, creative teachers for general comprehensive

schools, as well as involving capable young specialists who are willing and able to assist appropriate development of the learners into the teaching profession. Teachers at vocational schools should also possess high-quality skills appropriate to encouraging the learners' professional preparation and further development to meet the needs of the labor market and managing adults' further learning. New directions in teachers' professional development have also introduced stability in teachers' work load; by 2014, it will be fixed at 40 h per week, which takes account of their teaching commitment, their extracurricular activities and the preparation of teaching materials, etc.

The system of assessment, evaluation, and examinations will be improved; the number of state examinations for the general secondary education will be decreased, and tests after the acquisition of the basic education will be abolished. The examinations have been improved constantly based on the analysis of the processes and achievements of the previous years and the experience of domestic and foreign colleagues.

In 2012/2013, separate programs on *The World's History* and the *History of Latvia* were introduced in Years 6 and 7 in response to current social developments in the country. The aim of these changes is to improve learners' achievements in understanding the historical processes behind social developments in the world and those of the Latvian national state.

The political and economic stabilization of the country allows policy-makers the time to pay more attention to the safety of children at all types of schools and educational centers attended by people under 18 years of age, and the current changes in the Cabinet's Regulations deal with the responsibility of adults' and learners, as well as the procedures in situations when a learner threatens his/her own personal safety or that of others.

The transition to a learning educational institution instead from a teacher-centric one needs further improvement in terms of management and pedagogical processes at all levels, and new programs have been introduced for teachers' and educators' further professional development.

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27.1 History and Social Parameters of the Education System

Liechtenstein occupies an area of 160 km² and has just less than 38,000 inhabitants. It is twice the size of Zurich but with only one-tenth of its population. Since the

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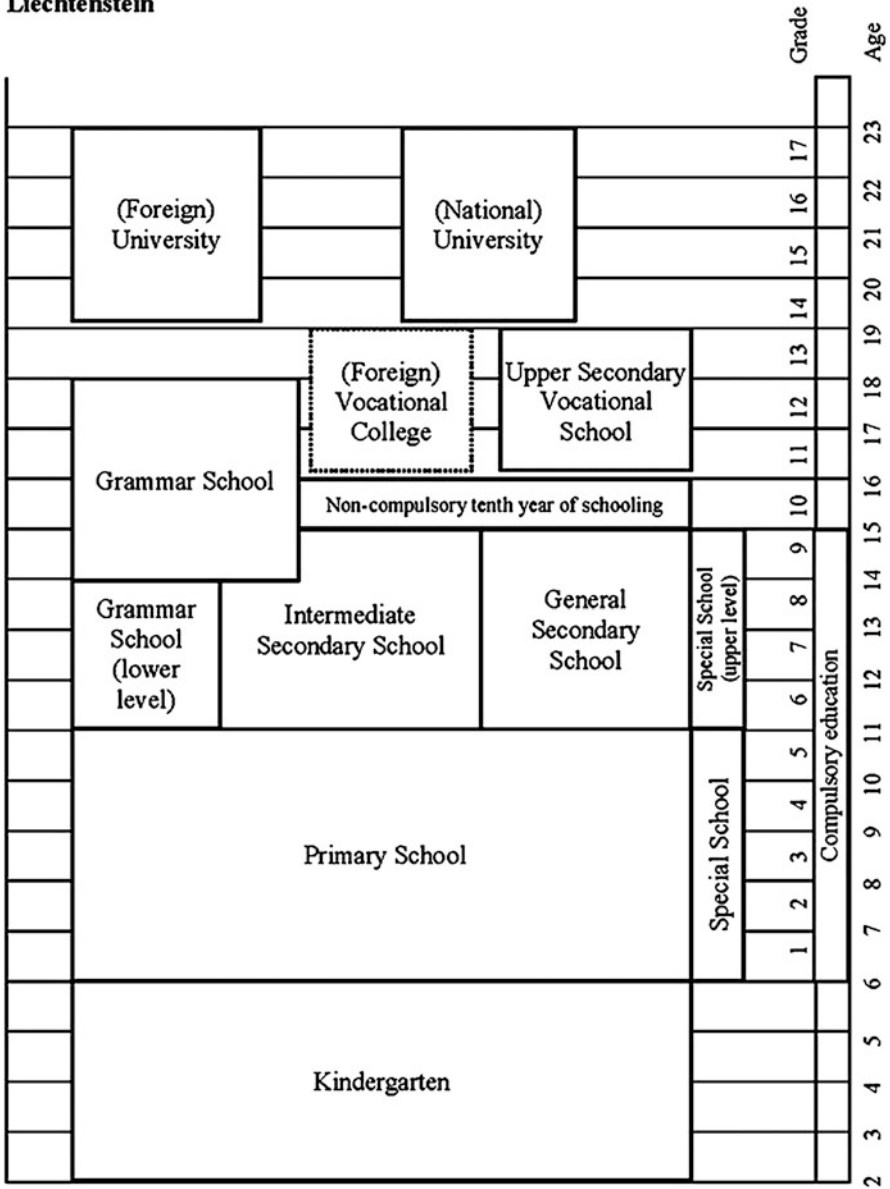
German Institute for Pedagogical Research, Frankfurt/M., Germany

1960s, the number of foreigners has increased substantially, and today they represent 34 % of the population and 60 % of the workforce (more than half of them being commuters from neighboring Switzerland and Austria). The Principality of Liechtenstein describes itself as a “constitutional hereditary monarchy based on democratic parliamentary principles.” As a consequence of the Napoleonic wars and the dissolution of the Holy Roman Empire, it gained enlarged sovereignty at first within the new Confederation of the Rhine put together by Napoleon in 1806 and later – after its eclipse – extended it to full sovereign independency. In 1868 Liechtenstein disbanded its army. After World War I, the country abandoned the currency union with Austria and, following a period of transition, replaced it with a currency union with Switzerland. The country has been a full member of the Council of Europe since 1978. In 1991 it joined the European Free Trade Association (EFTA) and in 1995 the European Economic Area, an organization that sees itself as a bridge between EFTA and the European Union (EU). Since that time, Liechtenstein has also participated in programs of the European Union such as Socrates and Leonardo.

The historical development of the concepts of education and pedagogy and the main characteristics of the Liechtenstein school system are closely tied to the whole German-speaking area – in particular its direct neighbor Austria and, since the beginning of the twentieth century, the German-speaking parts of Switzerland – without being identical to it. Overall, this balance between proximity and maintenance of distanced independence is typical for the political, economic, and cultural situation of the country. The special relationship to Switzerland, for example, is described in a brochure issued by the Liechtenstein Office for Vocational Education in the following way: “The experience of a common history, the kindred dialect, the Rhine valley as a common Lebensraum, a real economic and currency union bear witness to the importance of this closeness to Switzerland is for the Liechtenstein self-concept” (Berufliche Bildung 1997, p. 3).

Traditionally, there were educational facilities in the form of village and primary schools. Legally regulated schooling started in 1805, when an edict of the Prince prescribed that each community set up a school fund and introduce basic compulsory schooling. In 1806 and 1822, the first school ordinances were passed and in 1827 the first school law, which, among other things, declared that school fees should be abolished. A subsequent law from 1859 placed the existing regulations on another systematic level that has been expanded and supplemented time and again since. Today’s education system is primarily based on the School Act of 1971, the Vocational Education Act of 1976, and the Higher Education Act of 2004. A regulated vocational education system was only established relatively late largely “because of the predominantly agricultural structures, the minor role played by crafts and trades and the late industrialisation in the nineteenth century” (Berufliche Bildung 1997, p. 8). Nevertheless, there was always interest in vocational education. As early as 1793, a group of citizens wrote a letter to the Prince asking him to enable their children to receive a vocational education. Three boys were invited to Vienna for vocational training, followed by two more the next year (Negele, p. 1). However, the “first systematic efforts to provide for vocational training opportunities” were made much later, in the middle of the nineteenth century (ibid.).

Liechtenstein



The school law of 1929 finally prepared the legal basis for public vocational courses for apprentices (ibid). However, plans to establish an independent vocational school were abolished, and instead cooperation with the neighboring Swiss canton of St. Gallen was sought in the 1930s to make it possible for apprentices from

Liechtenstein to attend the local vocational school. In 1936 a law was passed that obliged apprentices to attend school in addition to their practical training. The Education Act of 1976 laid a new foundation for vocational education and established the Office of Education, which has been the supervisory and implementation body for vocational and professional qualification ever since.

Although the banking and finance sectors have contributed significantly to the prosperity of this once purely agricultural region in recent times, Liechtenstein's economy is not solely based on these. Since the mid-twentieth century, a soundly diversified economy has developed that generates nearly exactly the same number of jobs as inhabitants. Besides finance and tourism, key industries include metallurgy, mechanical engineering, pharmaceuticals, and precision instruments. In view of the positive economic developments, the vocational education system in Liechtenstein plays a central role. These circumstances were taken into account in the 1976 Education Act which fundamentally regulated the issues of maintenance, initial vocational education and continuing education, organization, and funding.

27.2 Fundamentals, Organization, and Governance of the Education System

27.2.1 State Supervision, Governance of Schools

In accordance with the constitution, the entire education system, public as well as private, is under state supervision. The main agencies of educational governance under the jurisdiction of parliament are the Office of Education, the Office of Vocational Training, and the Council of Adult Education which administer and supervise their various areas of competence. The Council of Education is appointed by the government for a 4-year term. Among other responsibilities, it makes proposals on the employment of teachers in state schools and on the appointment of head teachers, it approves pupils' changing schools, it endorses the earlier or later start at school for some pupils, and it defines obligatory in-service development courses for teachers. The Council of Vocational Training is also appointed by the government for a 4-year term. It advises the government and the Office for Vocational Education. The latter is responsible for implementing the Vocational Education Act, for appointing teachers, and for supervising vocational school and partner companies (Fürstentum Liechtenstein 2000, p. 10).

Kindergartens and primary schools are funded and run by local communities. They contribute mainly to current expenses and to the maintenance of buildings. Schooling in the municipalities is administered by the Municipality School Council, with itself elected by the Council of Municipalities. The Municipality School Council also defines the school districts, employs kindergarten teachers, and makes proposals for the selection of primary school teachers. In addition, it is also responsible for drawing up a budget for education and for monitoring the municipalities' own school buildings and equipment (Fürstentum Liechtenstein 2000, p. 11). Since 1999, there has been a common basis to the curriculum for

kindergarten, primary school, and the lower level of secondary education. A comprehensive aim-oriented curriculum applies to the compulsory schooling area of primary and lower secondary education, ensuring transparency and permeability between the different types of school. Albeit, individual schools enjoy considerable freedom in the ways they achieve the set goals.

Alongside the public schools system, there is also a private Waldorf school. Together with its attached kindergarten, it covers the first 9 years of school. There is also an integrated secondary school (comprising the lower and upper level of secondary education), “formatio,” which is maintained by the Stiftung Neues Lernen (New Learning Foundation). This is a full-day school, which, in addition to the general aims of learning inherent in the secondary school curriculum, focuses on the development of personality and particular talents and skills in key modern qualifications (such as IT skills, teamwork, etc.) (Fürstentum Liechtenstein 2000, p. 36). Although the private schools are subsidized by the state, parents pay additional school fees.

A comprehensive study carried out by Liechtenstein’s economic climate research center in 2006 analyzed and documented the state of educational funding. It showed that the country spent far less from public funds on education than the majority of OECD countries. In 2002, overall spending amounted to 2.7 % of GDP and in 2003 2.8 %. The OECD average in 2002 stood at 4.9 %: in the neighboring countries of Austria and Switzerland, it even reached 5.4 % and 5.7 %, respectively. A glance at the structure of expenditure reveals a specific distribution across education levels (KOFI 2006, p. 55 ss.). The aim of the study is not to protocol the status quo (after all, in view of the PISA results, this can hardly be described as a falling short) but to analyze in good time the conditions and opportunities facing Liechtenstein in an international context relating to the development of a knowledge-based society – especially in terms of higher education – to maintain contact to international discussions on educational funding and to develop strategies for the future.

27.2.2 The Teaching Profession

Access to the teaching profession is regulated by a series of directives which highlight the specific situation Liechtenstein finds it in: the majority of programs are run in other German-speaking countries. If the qualifications of prospective teachers differ in form or in content to standards required, supplementary examinations may become necessary. Degrees from Swiss, German, and Austrian universities are generally recognized for grammar school teachers. Initially, teachers are employed on 3-year contracts. Afterward, depending on the nature of the job, they may be awarded civil servant status or other contracts. In-service training for teachers is compulsory. This is usually organized by the Office of Education and typically covers 6 days per year. On top of this, there is also an extensive offer of in-service programs. Salaries for kindergarten teachers range from 33,000 to 53,000 Euros depending on service; the highest earners are grammar school teachers whose salaries may range from 60,000 to 83,000 Euros (European Commission 2006/2007, p. 153 – as at January 2007, exchange rate as at December 2008).

27.2.3 Quality Assurance

External evaluation is carried out by an inspectorate which reports to the Office of Education and is based on Guidelines for Quality Assurance and Development issued in 2000. There are inspectors for each level of schooling as well as special inspectors for each subject. Inspectors are appointed, with appropriate qualifications specified in interviews. Many inspectors follow programs run by the Swiss Association of School Inspectors. The image of the inspectorate has changed over the years from its former role as a body of control to one of consultation and support in school developments, and its explicit goal lies in assuring the quality of schools and lessons. In the compulsory school sector, inspectors carry out standard visits to school and hold regular interviews with teachers – usually every 2 years.

27.3 Overview of the Structure of the Education System

Liechtenstein has a three-track school system. Compulsory schooling lasts for 9 years and is completed in the 5-year primary school and in the three types of lower secondary school, i.e., general secondary school (*Oberschule*), intermediate secondary school (*Realschule*), and the lower level of grammar school (*Gymnasium*). The upper level of the grammar school lasts 4 years and leads to the award of the *Abitur* (*Matura*).

27.3.1 Preschool Sector

Preschool education comprises the *kindergartens* and, where applicable, *special preschool classes* which serve as a preparatory year before the children start school.

Kindergartens are open to children aged 4 and 5. In terms of its function and its character, this is “a type of school with clearly described pedagogical aims and didactic guidelines which are anchored in the curriculum” (European Commission 2006/2007, p. 42). Kindergartens are open all day across the country, and they are well attended, with 99 % of children registered at a kindergarten. The kindergartens themselves are established and maintained by municipalities which are obliged to offer sufficient places to accommodate all the children in any given age cohort. They are monitored by the kindergarten inspectorate of the Office of Education. Enrollment is free of charge and voluntary in principle; however, children whose mother tongue is not German are obliged to attend the second year of a kindergarten facility where they receive special German language teaching as preparation for attending school. The special day-care center in the city of Schaan operates a special school kindergarten. In addition, a private kindergarten is attached to the Liechtenstein Waldorf School. The kindergarten concept places emphasis on “social education and personal development; the development of speech, the senses, and movement; musical and rhythmical education; and graphic design” (Fürstentum Liechtenstein 2000, p. 16).

27.3.2 Primary Education

Primary schools normally accept children who have turned 6 years of age by the end of June. However, a flexible regulation in operation since 1999 governing the start of kindergarten could lead to a larger mix of ages in classes. Primary school lasts 5 years. Subjects include mathematics, German, nature (general) studies, creative design, music, sport, textiles and technical design, religion, and English (from the third year). Since early childhood, musical education was integrated into the kindergarten curriculum in 1980; this principle has been adopted in the primary sector and has been integrated into the first 2 years of primary school in cooperation with the Music School of Liechtenstein. Since 1999/2000 primary school pupils no longer receive numerical marks but only written assessments. They contain comments on learning and on nonacademic development of the pupils both for the previous and an outlook for the forthcoming year. Twice a year parents are invited to personal meetings with the teachers, where they are informed about these assessments. Also the pupils can attend these meetings if they wish so. An element of in-service teacher training focuses on form and philosophy of these assessments. Progress for the pupils to the next year is automatic, but pupils may voluntarily repeat a school year.

27.3.3 Transition to Secondary School

At the end of the 5-year primary school, children are allocated to one of the three school types at the lower level of secondary education. The primary school (the class teacher) prepares a recommendation during the last semester based on the assessment of the child which is given to the parents. In cases in which the parents do not agree with this recommendation, the school council makes the final decision having called in the primary school inspectorate and the psychological education service. In principle, pupils are distributed among the three types of school in-line with their achievements in general education subjects as follows: about 28 % of children in a school year attend *Oberschule*, 50 % a *Realschule*, and 22 % a grammar school (*Gymnasium*) (European Commission 2006/2007, p. 80).

27.3.4 Oberschule (Secondary Modern School)

The *Oberschule* is “a general education multilevel school offering various special support measures” (Fürstentum Liechtenstein 2000, p. 22) and comprises Years 6–9. Subjects taught include: German, mathematics, nature (general) studies, English, French, home economics, textiles and technical design, religion, music, creative design, IT, life studies, and sport. In addition, there are a variety of electives. In principle, the *Oberschule* is a school that caters for a variety of levels of ability. For children with learning difficulties, there are special supplementary lessons and such pupils may be taught in smaller groups. Above-average pupils are given additional lessons in mathematics and German. At the end of the first year at

the *Oberschule*, pupils who perform very well in the basic subjects are recommended for transfer to the *Realschule*. Others must take a test. At the end of Year 9, graduates of the *Oberschule* receive a certificate which takes into consideration the marks of the last two half-term reports. On top of this, the *Oberschule* themselves can carry out their own final examination, with the results listed in the certificate.

27.3.5 Realschule (Secondary Technical School)

Compared to the *Oberschule*, the *Realschule* offers “an extended and detailed basic education and prepares pupils for their vocational career or for another school career” (Fürstentum Liechtenstein 2000, p. 24). Although the subjects offered at the *Realschule* are very similar to those offered at the *Oberschule*, the program is somewhat extended, offering subjects such as Latin and other options. From the second year onward, ability streaming on two levels is adopted. Stream A prepares mainly for later entry to technical colleges and demanding technological and commercial apprenticeship programs and stream B for vocational training in industrial, technical, and commercial professions. Pupils with very good marks in the first, third, and fourth years of *Realschule* can transfer to a grammar school without any further examination. If pupils wish to change to grammar school but have not been recommended, they will have to take an appropriate examination.

27.3.6 Voluntary Year 10

Pupils who complete the *Oberschule* or *Realschule* can attend a tenth school year which was revised in 2000 and is seen as an independent type of school. There are three main profiles: languages and social professions, IT and handicrafts, and a general learning and social year. Programs aim to secure the transition to another school or to professional life. In this way, Year 10 provides guidance on the choice of a future career. Internships and work experience provide an insight in, and ease the transition to, professional life. Graduates of the *Oberschule* who have passed the *pro lingua* module can enter commercial professions. Presently, about 14 % of pupils who finish their compulsory schooling in the *Oberschule* or *Realschule* choose this non-compulsory tenth year of schooling.

27.3.7 Gymnasium (Grammar School)

The *Gymnasium* prepares pupils for the university entrance qualification, the *Matura*. Based on multi- or bilateral agreements, the graduation examination, the *Matura*, provides entrance to university in many countries. Since 2001/2002, there is a 7-year long form (with 3 years in the lower level and four in the upper level) and a 4-year short form of the *Gymnasium*. At the upper level, five profiles are offered:

- The “lingua” profile targets literature, art, philosophy, languages, and Latin.
- The modern languages profile also covers Latin and adds Spanish as the third foreign language.
- The art, music, and education profile targets specialist lessons in the relevant areas.
- The profile economics and law.
- The profile mathematics and natural sciences.

27.3.8 Vocational Education and Training

The system of general education schools and that of vocational education “have developed virtually independent of each other” (Berufliche Bildung 1997, p. 8). The latter has largely focused on the vocational education system in Switzerland, and there are close cooperations and joint facilities with mixed funding. The Office for Vocational Education works together with roughly 30 Swiss vocational schools and training centers. Overall, the collaboration covers master tradesman school, higher technical colleges, and universities of applied science. Because Liechtenstein cannot cover the training for all the professions exercised in the country, a government ordinance from 1977 automatically accepts all training regulations passed in Switzerland. “This solution was a logical one given that Liechtenstein cannot maintain its own vocational school and that the theoretical education nearly only took place in Swiss vocational colleges. Equally, apprenticeship examinations were also held in Switzerland” (Negele s.d., pp 5–6).

Career guidance of young people is becoming increasingly important – it is largely provided by the center of professional and career guidance. The significance of professional and career guidance becomes all the more clear by the fact that in the third and fourth years of the *Oberschule* and *Realschule*, career guidance is a mandatory subject. This program gradually leads pupils to make choices about their careers. The career information center also provides practical guidance and taster courses.

27.3.9 Apprenticeship Training

By and large, apprenticeship training corresponds to the dual system as practiced by the country’s German-speaking neighbors. Typical for this system, the apprenticeship is regulated in an agreement. Besides the practical training in a company, the apprentice usually attends vocational college for 2 days per week. Today in Liechtenstein, one also refers to a “tripartite” system, since training is now also provided in special facilities which are run by groups of enterprises or professional associations and which offer a number of regular or additional courses. The training normally lasts 3 or 4 years, with final examinations taking place in Switzerland. The Office for Vocational Education registers and mediates the apprenticeship, supervising the vocational colleges and the participating companies. In 2007, around

1,100 people were employed as apprentices (European Commission 2006/2007, p. 80). In addition to the regular initial vocation training program, there is a 2-year program leading to a semiskilled program (the *Anlehre*), a less demanding program which is completed with a practical examination but no final examination in the vocational school (Negele s.d., p. 7). There is also the so-called pre-apprenticeship for young foreigners in the form of regular work in a company for 1 year. In addition, German language is studied in the Interstate Vocational Training Center in the Swiss city of Buchs. These courses are also available to non-German-speaking young people who are not in a pre-apprentice program.

Around 750 authorized Liechtenstein companies train about 1,000 trainees in more than 100 professions (Berufliche Bildung 1997, p. 38 and Negele s.d., p. 3). These companies are authorized by the Office for Vocational Education, with 50 % of apprentices working in trade and commerce, 30 % in services, and 20 % in industry. About 20 % of the trainees in Liechtenstein companies are commuters from Switzerland (some also from Vorarlberg in Austria). Some young people from Liechtenstein do their practical work at companies in Switzerland. Because Liechtenstein does not have its own complete and separate vocational colleges, the majority (70 %) attend the Interstate Vocational Training Center in Buchs, Switzerland, the rest other vocational schools in Switzerland. An increasing number of additional (day or evening) courses or secondary training programs is currently being offered which deepen and broaden or upgrade existing qualifications.

27.3.10 Postsecondary Education

Some vocational qualification courses are offered in professional schools. Besides a commercial college, there are also programs in health administration, hotel industry, and arts and crafts. By attending 2-year evening courses in an upper secondary vocational school (*Berufsmittelschule*), graduates of initial vocational training may gain a so-called professional *Matura* entitling them to continue their studies at a tertiary-level institution. This enables them to enter a university of applied sciences/polytechnic in Liechtenstein, Austria, or Switzerland or partner institutions in Germany without taking an entrance examination. Courses concentrate on standard general education subjects (including legal studies, business studies, communication, and IT), alternative profiles (natural sciences, economics), and options. Professional people (with an apprenticeship and experience) can take a 3-semester preparatory course which enables them afterward to study at a university of applied science. A 1-year full-time program prepares students for their technical *Matura*.

27.3.11 Special Schools and Support Activities

The special day-care center in Schaan also operates as a special school. In addition, there are three school classes and two kindergartens that integrate children with minor development disorders. Furthermore, there are other school-based and

nonschool therapy and care measures. Special support services are provided at primary school, at the *Oberschule* and at the *Realschule*. These include special start times, German courses for non-German speakers, supplementary lessons, special support lessons recommended by the school psychological service for pupils with specific learning problems (e.g., dyslexia), and special support in the form of smaller groups/classes of six to ten children. If needed, pupils in the lower years of the grammar school may also receive support in German, English, and mathematics.

27.3.12 Higher Education

A law passed in 1992 converted the Liechtensteinische Ingenieurschule (LIS) into a university of applied sciences, formally providing Liechtenstein with a tertiary sector of education. Since 1999 the university of applied sciences has also been offering degree programs in business administration, with a major in financial services. The university of applied sciences also offers upgrading courses in a variety of professional areas such as construction management, logistics, management of fiduciary companies, economic engineering, and others. Since 1997 the Fachhochschule Liechtenstein has been a foundation under public law. Liechtenstein, together with two Swiss cantons, also operates the Technical College in Buchs in Switzerland (*Interstaatliche Fachhochschule für Technik*). The International Academy for Philosophy (*Internationale Akademie für Philosophie*) is a private institution. Courses lead to the MA or the PhD. These degrees are equally recognized in Germany and Austria. The Liechtenstein Institute is an institute for academic research and teaching. It does not award degrees itself but can offer academic assistance to university students at degree or doctorate level at foreign universities. Because higher education opportunities are restricted, most Liechtenstein university students study abroad. An agreement concluded in 1976 secures the right of all Liechtenstein pupils with *Matura* to study in Austria and Switzerland. Admission to German universities depends on the case-by-case decision of the respective *Länder* authorities. A general agreement has, for example, been concluded with the University of Tübingen.

27.4 Developments in the Current School System

Back in 1987, a commission proposed substantial reform measures and the introduction of a new school structure. These proposals, however, had no clear support from the public. In 1992 a commission was appointed to develop a new model. Proposals suggested led to a government draft being drawn up in 1998. “The draft envisages a cooperative 4-year model of secondary school, streamed according to ability into two core classes and in three subjects. The Gymnasium begins after Year 7 as an independent type of school” (Fürstentum Liechtenstein 2000, p. 8). Moreover, a parliamentary resolution passed in 2000 envisages a comprehensive

reform of the upper level of the Gymnasium with a flexible system of courses replacing the previous five classes. Some reforms (the introduction of foreign language lessons in Year 3, new guidelines for awarding marks, initiating new programs of aims) were implemented at an early stage; reforms and discussions are continuing.

In the field of vocational education, changes need to be made in the light of demographic, economic, and technological developments, combined with the introduction of double qualification courses leading to a *Matura* in general and theoretical vocational subjects. Emphasis has been put on supporting more demanding training in attractive and innovative fields. In future, apprenticeship training should be characterized by a stronger focus on interdisciplinary work. This applies especially to the *Berufsmatura* which is to become a “model of integrated education” (Fürstentum Liechtenstein 2000, p. 39). The teaching of foreign languages, especially English, is seen as a priority. Professional continued education should continue to be promoted, especially in cooperation with neighboring countries.

Some key discussions, plans, and measures have taken up issues relating to:

- The expansion of measure aimed at promoting evaluation and quality.
- The strengthening of educational continuity and the flexible approach to the transition from preschool/kindergarten to school. From 2006 there was a 4-year project for a new basis school in which 4- to 8-year-olds are taught together.
- Increased emphasis given to standard high-German and the language of instruction. A corresponding evaluation report that highlighted deficits and proposed recommendation has formed the basis for new “Guidelines on the Use of High German” to be implemented from 2006/2007 to 2009/2010 in kindergartens, with the proportion of High German being successively increased. The local dialect is to remain for some subjects and activities.
- For some years there has been a project in primary schools especially aimed at supporting gifted children. Regulations governing this were to be implemented from 2010. The agenda also envisages starting English lessons from Year 1 instead of Year 3.

27.4.1 PISA

As in PISA 2003, Liechtenstein ranked in PISA 2006 in part well above its neighbors Switzerland, Germany, and Austria in all areas researched. Not only is the overall position pleasing for Liechtenstein, but it is one of an exclusive circle of 9 from 57 countries in which an above-average number of pupils (over 2 % of pupils surveyed) achieved the highest level (level 6) of competence in natural sciences. It is certainly difficult to compare countries directly given their different sizes and socio-economic conditions. Especially Liechtenstein’s position is likely to have been affected by its unique three-track system revealing heavy score differences (for 2006, the average *Oberschule* score in natural science was 422, with 521 in the

Realschule and 615 in the grammar school – PISA 2006; Moser and Berweger 2006; Weidkuhn 2007). Nevertheless, despite these variations, the proportion of pupils at risk in two lower levels of secondary education was smaller than that of its neighbors. In addition, also the educational integration of immigrant children has been a success over two generations.

There are few countries in which the second-generation children of migrants perform worse than those of the first generation. This is in Europe (in countries with a share of at least 3 % of first- and second-generation migrant background students), e.g., in sciences only the case in Germany, the Netherlands, and, to a lesser degree, in Austria. In the contrary, in Liechtenstein both generations perform visibly better than their counterparts in most other European countries. The ratio of the second-generation migrant background youth who did not reach even the second level in sciences was 18 % in Liechtenstein but 31 % in Switzerland and as much as 40 % in Germany (OECD: PISA 2006, p. 177). A special follow-up study showed most similarities of PISA results and related issues between Liechtenstein and some neighboring German-speaking Swiss cantons (Moser and Berweger 2002).

The success for Liechtenstein has been confirmed in subsequent surveys (OECD: PISA 2012), showing even an improvement in performance in all three academic skill categories since the first PISA study up to 2012.

The positive PISA results are certainly due to a set of factors, rather than to a single reason. These might include the well-manageable size and the prosperity of the country, the intimacy of the social community and the relative homogeneity of the social structure, the relative political unity, and the local authorities' and public's in-depth knowledge of the education system and its institutions – all of which eases prevention and intervention processes. However, there are some typical features of the education system that can be highlighted and which may have contributed to the good PISA results:

- Nearly all children visit a coherent and structured preschool facility, and improvements in the performance of pupils are also achieved through early diagnosis of risk factors and intervention, control of the early learning environment, and care and support given in the transition between preschool and school.
- For children with a mother tongue other than German, preschool is obligatory for at least 1 year. This shows how much emphasis is given to systematic linguistic and cultural preparation for attending school.
- Although Liechtenstein has a three-track school system, pupils are only separated after Year 5, and educational policy targets a high level of commonality in lower secondary schools which is expressed by a certain unification of the core curriculum of the first 2 years in the various schools. An explicit goal of the *Oberschule* is to prepare pupils to transfer to the *Realschule*. These aspects may contribute to correcting wrong and demotivating earlier assessments, thus ensuring a degree of permeability in the system.
- The supporting systems, the care, and thus the performance in Liechtenstein's *Oberschule* may be generally on a higher level although pupil achievement is

relatively low and may thus lead to better results than in its German formal counterpart (“*Hauptschule*”). It may also prevent the school from becoming a bucket school as may be the case elsewhere.

- The intensive care for the very well-developed vocational education and training sector certainly influences positively the whole school system and its overall functionality. Liechtenstein shows how a coherent and efficient educational policy with clear goals and systematic support measures – a mixture of clear central guidelines on the one hand and the active involvement of local administration, schools, and parents and the positive use of social controls and intervention on the other hand – can bring about visible success. Interestingly, comparatively good results have been achieved through modest public expenditure, suggesting that funds have been deployed effectively. A school system in a small community is not automatically predestined to achieve better, but under favorable conditions, a coherent educational policy is easier to implement than in a larger political unit or in an anonymous metropolis. This underscores the general question of how to achieve an optimal balance between centralized control and local responsibility.

27.5 New Developments

“Liechtenstein’s raw materials are knowledge and research,” says a quote from a study commissioned by the government which summarizes the educational strategy for the coming years (Liechtenstein lernt 2011). This is why it is considered to be necessary to ensure and to develop the attractiveness of Liechtenstein as a location for education, culture, and business in the present and future (ibid, p. 6). The study emphasizes the priority afforded to four overall framework objectives: efficiency, enhancing qualification, equality of opportunity, and social cohesion. A new priority is given to supporting independent higher education and training. The study is aware that there are conflicts of interest in the education system and that these cannot be set aside by law. But analyzing them makes it possible to draft possible strategies and to pursue desirable priorities. The document encourages one to “follow a new path in Liechtenstein’s educational policy. For the first time, superordinated, long-term goals in Liechtenstein’s education system are being defined and current measures and projects across all areas of education (kindergarten and compulsory schools, upper level of secondary education, tertiary education, continuing education and lifelong learning) have been outlined” (ibid, p. 23). In principle, the focus is on European strategic targets passed in Lisbon and on formulated benchmarks. However, uniqueness has also been emphasized: “The significance of these benchmarks is only partially relevant for Liechtenstein.” This hints at Liechtenstein’s above-average results in the PISA studies, the relatively low proportion of the population at the lowest level of school achievement, and the low dropout rate. It also refers to the specific role of vocational education and highlights the country’s own position which

has proved to be effective: “In the strong and competitive dual vocational education system, as is the case in Liechtenstein and in Switzerland, it is not desirable to have at least 40 % of the population with university degrees” (ibid, p. 27).

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D. Kiliuvienė (✉)
University of Klaipėda, Klaipėda, Lithuania

28.1 History and Social Parameters of the Education System

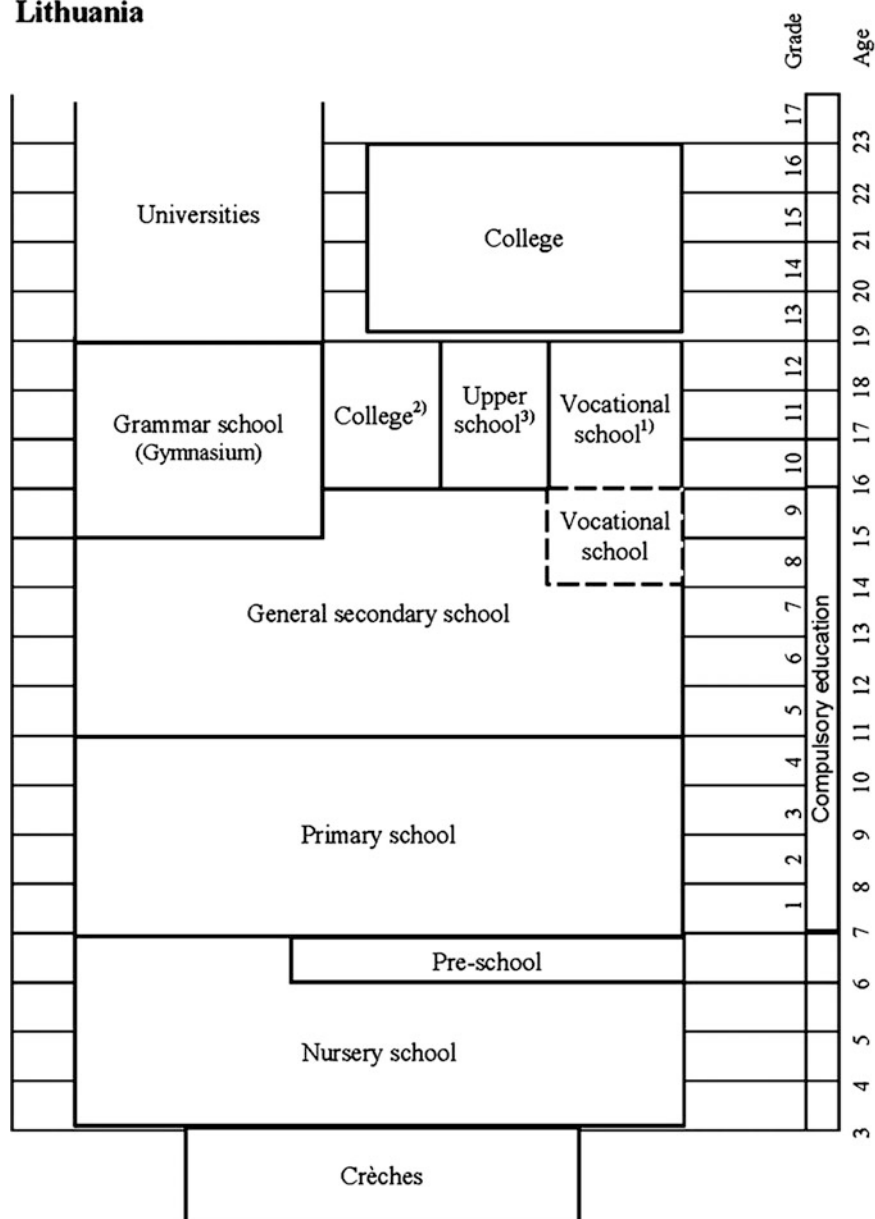
Lithuania is one of the Baltic republics; its capital is Vilnius. The population of 3.5 million is made up of 81 % Lithuanians; in addition 8.5 % are Russian, 7 % Polish, 1.5 % Belarusians, and 1 % Ukrainians. Ninety percent of the population is Roman Catholic. The national language are Lithuanian. Thought to be one of the oldest languages, it is part of the Indo-Germanic family of languages. Lithuania is a parliamentary republic with the president as the head of state.

The intensive political, social, and economic changes that spread across Central and Eastern Europe at the beginning of the 1990s had a direct impact on Lithuania. The collapse of the former Soviet Union brought about reforms in the education system in the very first years of independence. It was somewhat symbolic that as Lithuania declared its independence in 1990, it also celebrated the 600th anniversary of the Lithuanian school.

Reforms in Lithuania primarily focused on three key areas of social life: in politics it chose a path of federalism; in religion it pursued an ecumenical development; and in education it created an education system fully based on democratic principles.

In setting up a democratic education system, the country fell back on more than 500 years' experience. The first school in the Kingdom of Lithuania was mentioned in the fourteenth century and was established in the Vilnius cathedral. In the sixteenth and seventeenth centuries, more than 100 schools were opened in various cloisters. At the end of the eighteenth century, Lithuania boasted 195 primary and 11 middle schools. In the first half of the nineteenth century, Lithuanian schools were reformed in line with the Russian model, and in the nineteenth century, there were already 426 basic schools in the counties of Vilnius and Kaunas. In the twentieth century, Lithuanian schools were subject to three major changes: between 1919 and 1940 in the period of state independence, between 1940 and 1985 during Soviet times, and from 1988 as plans for the Lithuanian national school were announced while Lithuania was still a part of the USSR. These reforms have extended into the twenty-first century. The Lithuanian education reform is based on firm strategic principles. The concept of the Lithuanian national school of 1988 was completed in 1992, becoming the Lithuanian educational concept. This made possible to implement reforms independent of the several changes of the government. In 1991 the Education Act was passed and in 1998 amendments ratified. In 1997, the Vocational Education Act was passed which defined the structure and administration of vocational education as well as the relationship between state institutions and social partners. A law introduced in 1998 governing nonformal adult education made the adult education system in Lithuania much more flexible to manage. In the same year, the law regulating special education was passed, giving children and young people with special educational needs a chance to receive a general and vocational education until the age of 21. This also ensured the continuity of educational reform. The reform process which was triggered by the Lithuanian General Concept of

Lithuania



¹⁾ Vocational school: which run programs in the most important areas of vocational education

²⁾ Colleges: which run programs for non-university based tertiary education

³⁾ Upper school: for programs leading to the middle school certificate and for post-secondary Certificates that are not university degrees

Education in 1992 was planned to cover a period of approximately 16 years and can be divided into the following phases:

- 1989–1990: The concept of the Lithuanian national school is announced; at the same time, work on new education programs, textbooks, and learning materials begins. Moreover, theoretical and legal bases for education reforms are prepared.
- 1990–1993: Administrative structures are reorganized, and vocational and technical upper secondary schools and universities are remodeled. The Lithuanian Education Act is passed.
- 1994–1998: A coordinated holistic system of education is created that embraces both formal and nonformal aspects of education and the establishment of public and private educational facilities.
- 1998–2005: Reform results are specified and general conclusions drawn, structures are reviewed, and textbooks are identified and edited.

The second phase also takes particular account of the democratization of civil society, the consolidation of the market economy, and the EU candidacy of the country. Thus, education in Lithuania is of special strategic value. However, developments in the education system have been bipolar: while on the one hand progress can be seen, on other hand what the country has is being eradicated. This stage of reform is largely based on the principles of humanity, democracy, nationality, and openness. In 2003, a new law on the education system was passed that extends these principles to include the principles of equality of opportunity, of contextuality, of effectiveness, and of continuity.

The final phase comprised two elements: The first stage of the Lithuanian education reform ended in 1997 with the most important draft laws having been prepared. The network of pedagogical and psychological support services began to function, and the education system for children with special needs was created. At this time, new types of preschool education were developed. Preparations began on the transfer to 10-year learning at basic schools and more profiled learning in the middle school. A network of youth schools was established, the first steps toward the reform of the vocational education system were taken, and the system of adult education was remodeled. Qualification levels for teachers and head teachers were defined. Still in progress, the second stage formulated three priority goals:

- To modernize the process of learning and studying and to raise the quality of qualifications
- To improve the social and pedagogical conditions for learning and studying and to ensure access to education for everyone
- To harmonize the education system, because to date, the most important political powers in the country have not yet managed to agree on a common national policy on education

28.2 Fundamentals, Organization, and Governance of the Education System

28.2.1 Current Educational Policy and Goals of the Education System

The Lithuanian education system is based on values held in Lithuanian culture and the fundamental values of European and worldwide culture: self-respect and the dignity of a person, love of one's neighbors, the fundamental right to equality, freedom and rights, tolerance, and a democratic structure in society. Education should aim to promote personal development and the skills to align one's own life and actions in terms of these values. On top of this, the Lithuanian education system is based on the humanistic and democratic principles mentioned above. Strategy documents on Lithuanian education target strategic goals highlighting:

- Effective, harmonious, and responsible management, purposeful funding, and the acceptable use of resources in the education system
- The establishment of a socially fair education system that guarantees lifelong access to education for all
- The development of quality in education that meets the current needs of society, individual perspectives, and the challenges of a social market economy

The most important document describing the development prospects of the education system in Lithuania and the opportunities of realizing them is the Educational Strategy of the Country: 2003–2012. This strategy draws on the concept of primary school from 1988, the concept of the school in Lithuania from 1992, and the priorities of the second stage of the education reforms of 1998. In 2002, the parliament of the Republic of Lithuania – the Seimas – ratified the development strategy of the country. This envisages three priorities: the creation of an academic society, a safer society, and a competitive economy. Implementing the strategy involves:

- Managing the education system and focusing on the regular assessment of the state of institutions at all levels of the education system, on the culture of leadership in the education system, on public information, on the use of financial funds and resources, on improving school participation, and on the quality of the education system
- Securing equality of opportunity for each individual when they start school, securing required preschool and school induction services, securing safe and socially fair conditions for learning, and securing the conditions to facilitate lifelong learning
- Reshaping the content of learning based on the development of individual skills and the in-service training of teachers, based on the regular assessment and evaluation of educational activities, and based on the modernization of general education and the improvement of educational provision

The most important tasks involved in managing the state education system include:

- Improving leadership at all levels of the education system (implementing the principles of subsidiarity and financial transparency)
- Improving the infrastructure (extending educational services and education programs)
- Improving support given to both learners/trainees and to education facilities
- Improving educational content (enhancing the content of programs, making education more individualized)
- Staff training (reviewing training and development courses for teaching staff)

The Lithuanian education system comprises: formal education (in primary schools, general secondary schools, lower secondary education, vocational education, universities of applied sciences, and universities), nonformal education, particularly preschool and other nonformal channels of education for children and adults; individual informal learning; assistance to learners and trainees (informative, psychological, social, and pedagogical assistance and health supervision in schools); and support for teaching staff and individual education facilities (information, consultation, in-service training, etc.).

The Education Act envisages that skills acquired in nonformal education and informal learning can be recognized in formal education. However, the necessary recognition system and corresponding methods for this have not yet been introduced. Work is still in progress on the structures of the education system: the standard system of vocational education is not quite ready, for example, adults without qualifications who have nevertheless acquired appropriate skills through their professional work and informal learning are still judged in accordance with formal rules; nonformal education is still not recognized everywhere. For this reason no certificates are issued, whereby skills acquired over a longer period in music, art, sports, and some other schools are recognized as modules in vocational education. The education strategy envisages bringing a certain degree of order to modular accreditation and to programs of formal and nonformal education. Conditions are to be created to enable older people who have the practical skills and relevant knowledge to be admitted to examinations and to acquire state-recognized professional qualifications without previously having attended vocational schools.

The integration policy of the Lithuanian education system can be described as the search for the best way to promote special education, i.e., children with special educational needs have the choice of either attending special schools, or schools with special classes, or attending integration schools. The respective programs are tailored to the needs of the children and their families. Both special and integrative educations have a clear legal basis in Lithuania (the Special Education Act from 1998 and the Social Integration of the Disabled Act from 2004). Unfortunately there is no reliable statistical information on current special needs education. According to information provided by the statistics department of the Ministry of Education, in 2001/2002, roughly 10 % of pupils in schools had special educational

needs. In 2002 13,000 children were recognized as being disabled in Lithuania. The health supervisory office does not have any more recent figures on disabled children in terms of age and gender. Based on the statistical information available, it is obvious that the percentage of children with above-average special educational needs has fallen considerably (1.88 %). About 8 % of children who would have to be recognized as disabled and their families receive no appropriate social support. The relevant special education services only receive a small number of children whose disabilities have been identified at an early stage. Many needs only become apparent once school has started.

In a bid to support the socially disadvantaged, measures such as extending professional rehabilitation, improving the integration of the unemployed in the labor market, preventing social exclusion, and strengthening social integration are foreseen.

28.2.2 Legal Foundations of the Education System

The most important statutes governing the education system are:

The Law amending the Education Act of the Republic of Lithuania (2003): As an umbrella law, this regulates educational goals, principles, structures, content, and rights and duties. It describes the structure of the education system. The education act stipulates that all vocational schools, grammar schools, and other providers that hold an appropriate license can carry out programs of formal vocational education.

The Vocational Education Act (1997): This determines the structure and administration for the vocational education system based on collaboration between state institutions and social partners. It regulates vocational education ensuring that is carried out in line with defined requirements for learning and training programs. The law contains regulations governing accessibility to vocational education and the transfer to the labor market. In 2005, an amendment was passed that regulates the quality of vocational education, the management of vocational education, and the self-governance of educational facilities. The amendment also introduced a four-level system of training programs. These are distinguished by their varying content and duration and are tailored to different age groups and to different educational circumstances of young people. To gain a vocational qualification, young people can choose between programs of two or four levels. The level one program is combined with school-based general education and the level three program with the final examinations of lower secondary education.

The Higher Education Act (2000) defines the principles of higher education, the fundamentals for gaining a degree, the autonomy of universities, the scope of their activities and the rights and duties of the teaching staff, issues of funding higher education, etc. This law creates the basis for recognizing nonuniversity-based higher education. An amendment to the law from 2001 stipulates that some students at state universities have to pay semester fees.

Table 28.1 Responsibilities of the key players

Seimas (parliament)	Passes the state strategy for education, defines the priorities of education policy, determines long-term education goals, agrees important changes to content, sets priorities in funding (as a rule, strategy is determined for a period of 10 years), etc.
Government	Bears responsibility for compiling and implementing education law, resolutions agreed by the Seimas, and long-term state education programs; coordinates the activities of ministries on issues relating to education, reorganizes or closes technical universities and nonuniversity courses, etc.
Ministry	Responsible for education policy; for the development of strategic educational plans; for the content of education, textbooks, and materials; for guidelines on examinations; for the initial and in-service training of teachers; etc.
County and municipal authorities	Responsible for special schools, education and psychological offices, teacher training centers, the implementation of state education policy, local strategic planning and the network of vocational education, etc.
Maintaining bodies	Ensure the implementation of education policy, laws, government resolutions, and other regulations governing school activities, the functioning of the school and its democratic management, etc.
Head teacher	Manages the school in line with strategic plans and annual school programs, is responsible for school activities and the condition of administrative resources and for school achievement and regular evaluation, is responsible for appointing and dismissing teachers and other school staff in accordance with defined regulations and laws, approves their job descriptions, etc.

The Non-formal Adult Education Act (1998) regulates the system of adult education; defines the framework for appropriate structure, activities, and management; and provides participants with legal security.

Finally, the Promoting Employment Act (2006) is also important for the education system providing the legal foundation for promoting employment.

28.2.3 Management of the Education System

The education system is managed by the Seimas, the government, the Ministry of Education and Science, other ministries, county authorities, district authorities, maintaining bodies, and the schools themselves. The table below describes the most important areas of responsibility (Table 28.1).

Besides these key players, other institutions are directly involved in the management of the education system. Particularly worth mentioning are the Centre for the Evaluation of Education that analyzes and evaluates the state of general education and initiates and implements innovation in content and organization; the State Examination Centre that compiles national tests and examinations, carries out tests of achievement, and conducts international assessments

of performance such as TIMSS, PIRLS, ICCS, PISA, and TALIS; and the Centre for Teacher Training that organizes and delivers in-service training.

28.2.4 Funding the Education System

Since 2002, an incremental change in the funding of education has been taking place in Lithuania, with the change toward a system based on pupil or student numbers. This has been described as *pupil vouchers*. Schools receive two-thirds of their funds directly from the state; this is intended for salaries, social insurance, school management, educational and psychological care, in-service training, textbooks, teaching material, etc. One-third of the school budget comes from school-maintaining bodies (county or municipal authorities) which is also intended to cover salaries for ancillary staff, electricity, heating, water, etc. This procedure has been practiced since 2005 in state-run and non-state-run schools, in vocational schools, in preschool institutions, and in educational and psychological offices. These new rules governing funding provide a more effective and rational allocation of funds for education and are quite beneficial for the schools themselves. Although it does require head teachers to make sensible and deliberate use of the resources available, it does provide greater leeway for the schools. A law providing social support for pupils gave all pupils in Lithuania lunch free of charge until 2008. From 2009 this only applies to primary school pupils.

Lithuania's education policy stipulates that funds of not less than 6 % of the country's gross domestic product should be made available for education (cf. Education Strategy p. 32). However, this is currently creating a dilemma: on the one hand, pupil vouchers for pupils with special educational needs are increasing, and the notion of pupil vouchers is being transferred to the nonformal education sector, and on the other, the more money is pumped into nonformal education, the lower is the proportion of educational expenditure on GDP.

Since 2003, taxpayers have the right to donate 2 % of their income tax to public facilities determined by law; most of the time taxpayers choose educational facilities.

28.2.5 Relationship Between the Public and Private Sectors

In 2007/2008, there were 1,448 general schools in Lithuania attended by 485,879 pupils. Of these, 26 (just under 2 %) were non-state run, and 16 (1 %) were private schools. At present there are nearly 30 private preschool and school facilities, seven crèches and nursery schools, eight general secondary schools, eight primary schools, and four grammar schools.

According to the department of statistics, in 2005 2,542 pupils attended private schools and 110 children attended preschool facilities. In 2006, the number of pupils rose to 3,321 and preschool children to 122; in 2007 there were

3,563 pupils and 122 preschool children. In total, however, this is still less than 1 % of all pupils attending general schools.

28.2.6 Quality Management

Education in Lithuania is rigorously decentralized, provided it is in line with the principle of subsidiarity. Schools are monitored on the basis of legal provisions governing the monitoring of the education system, following defined criteria for assuring quality in education. School-monitoring authorities receive data on the situation of the education system from the education information service, assessments from pupil reports and from international tests.

Evaluations, including self-evaluations, are standard practice across all levels of the education system, from preschool facilities through to universities.

Plans to reform higher education are currently being compiled but aim to increase the quality of university study and provide better funding. In a bid to improve the quality of university study, a great deal of attention is currently being given to regulating the structure and content of higher education programs and to evaluating and accrediting them. Lithuania has a center for evaluating the quality of university study. In 2004, 91 higher education programs were subject to evaluation, 29 courses were evaluated by international experts, 50 were accredited, and 32 programs were registered.

In 2002, documents were compiled aiming at extending teacher training, in particular in relation to the concept of teacher at vocational schools. In addition, technical skills for the teaching profession were reviewed. The main aim is to promote innovative professional training. As part of this, teacher skills need to be in tune with the requirements of the modern academic world, of technology, and of best-practice criteria. In 2004, a network for in-service training was established which forms part of the European network TTNET.

28.3 Overview of the Structure of the Education System

28.3.1 Pre-primary Education

Participation in the preschool education is not mandatory. Children from the age of one up until school age can attend crèches and nursery school, with nursery schools only being available for children from the age of 3 upwards. Nationally, roughly 50 % of all children attend one of these facilities. Here, carers require a pedagogical qualification. Pre-primary activities can take place at one of these facilities for children from the age of 6. In rural areas pre-primary activities can take place at a normal primary school. Pre-primary education is supported by the state which pays a pupil voucher for each child. Lessons are conducted in Lithuanian, but children from ethnic minorities can be prepared for school in a separate facility or in a group in which some or all of the children cannot speak Lithuanian.

28.3.2 Primary Education

Pupils begin their first school year on the 1st of September. It lasts until the 29th of May of the following year, covering 32 weeks, or 160 school days. Primary school covers Years 1–4. Achievement is not graded using numerical marks. Instead, individual progress (using an idiographic form of assessment) is measured by comparing current performance with that of the past.

The core elements of the primary school curriculum include Lithuanian, ethics or religion, mathematics, natural science, art, and sport. From 2009, a foreign language (English, French, or German) became compulsory from Year 2. Parents choose the first foreign language; pupils themselves choose the second foreign language in Year 6. In Year 1, lessons last 35 min, and later on they last 45 min. Schools have a prescribed number of lessons for formal and nonformal education. The timetable is proportionally divided into the following subjects: Lithuanian 33 %, mathematics 20 %, natural sciences 9 %, art and technology 18 %, sport 12 %, native language for ethnic minorities 29 %, and Lithuanian as a second language 13 %.

Lessons in schools for ethnic minorities (Belarusian, Polish, Russian, German schools) are taught in their native languages. In schools where lessons are taught in foreign languages, there are also lessons in Lithuanian as a second language. Bilingual curricula are also permitted.

The Lithuanian education system allows for a variety of programs to be delivered at all levels of the education system. Primary schools provide three basic types of curricula: (a) general education, (b) basic education for children with special educational needs, and (c) programs focusing on reading, writing, and arithmetic (basic skills). This differentiation allows for the better integration of pupils with special educational needs in general schools.

28.3.3 Lower Secondary Education

Based on the Education Act (2004), the Lithuanian education system is divided into five groups from lower secondary education: schools of general education, vocational schools, universities of applied sciences, universities, and schools of nonformal education, and each of these groups is further divided into types (school types). There are different types of general school: general secondary school, middle school, grammar school, art grammar schools, conservatories, youth schools, special schools, and the so-called socialization facilities.

Once pupils have finished primary school, they transfer to general secondary school. Here, they have two options: general secondary school (Years 5–10) or general secondary school (Years 5–8) and grammar school (Years 9–12). As a rule, pupils attend general secondary school – also called middle school – for 6 years. After Lithuania secured its independence, the general secondary school was introduced as the school to transfer to in lower secondary education after the primary school. At the same time, compulsory schooling was raised to 16. Subjects taught

mainly comprise Lithuanian, a foreign language, ethics (or religion), mathematics, people and the environment, biology, chemistry, physics, IT, history geography, art, music, and sport. From the age of 15, pupils can decide on their own whether to attend lessons on religious education or not. General secondary school education finishes with a series of compulsory examinations. According to the Education Act, learning can continue afterwards either at the middle school or at a grammar school. Pupils may also decide to enter the world of work. Most pupils decide to continue to the upper level of secondary education.

Education comprises two main levels: the first from Years 5–8 and the second level, Years 9 and 10. Lessons can be divided up as follows: Lithuanian 16 %, other native languages (Belarusian, Polish, Russian, German) 15 %, Lithuanian as second language 11 %, mathematics 13 %, natural sciences (biology, chemistry, physics) 13 %, IT 3 %, history 7 %, and geography 5 %. Schools may also opt to change 25 % of curricula content, as is the case with music, art, and grammar schools and conservatories. For all other types of school, changes in subjects and hours taught are only permitted up to 20 %.

28.3.4 Special Needs Schools

In Lithuania, approximately 11 % of all pupils have special educational needs. Of these, 89 % attend general education school with other children; partially integration is applied to 1.4 % and 9 % of children with special needs who attend separate special schools. In the last 6 years, the number of children and young people up to the age of 21 integrated in schools has risen to 10 % of all learners, reflecting how well children with special educational needs have been integrated. Each year more funds are provided to improve and expand integrated education. In 2005, pupil vouchers were increased for these pupils by 20 %.

Children with special educational needs are classed as follows: 60 % of children with special educational needs have speech impediments or other disabilities that hamper their communication abilities, 20 % have learning difficulties, 8 % are mentally handicapped, 4 % are sight impaired or blind, 1 % have hearing difficulties or are deaf. This does not include children with physical disabilities, children with behavioral and emotional problems, and children with other somatic disorders.

The majority of children with special educational needs can be taught at general education schools with the help of an assistant teacher. Curricula are modified or adapted by the subject teachers for such children. The achievement of pupils taught in line with a modified program is assessed based on performance testing regulations which are established in the general education program. Pupils who have followed an adapted program are assessed at the discretion of the teacher. As mentioned, children with special educational needs can also be taught in special schools or in special classes in general education schools.

At the same time, educational and psychological care services have been expanded. At the beginning of 2004, these services were only available to 26 local authorities, and now 50 authorities can draw on these services. The aim

of these care services is to support and encourage young people with special educational needs and children and young people with psychological problems or with personality development or education issues. Such care is looking to strengthen a child's mental state by providing teachers and learners with the necessary information, experts, and advisory support. Two of the functions of the service are to gather and analyze appropriate information on young people with special educational needs living within the service and to initiate support measures. In 2001/2003, the Ministry of Education and Science financed 470 jobs for special needs teachers. Since 2004, these positions have been financed by pupil vouchers. At present over 900 special needs teachers are employed at the various educational facilities in the country. In 2005 there were 99 special (pre-) schools with special groups in Lithuania. In addition, there were 194 schools with remedial classes for children who were partially integrated. Moreover, conditions are being gradually improved for children with special educational needs to learn at vocational schools. The number of students with disabilities at universities and colleges has increased.

28.3.5 Upper Secondary Education

After attending the general secondary school, pupils can transfer to the middle school. Still using the old Soviet terminology, the middle school is the last level of general education (Years 11 and 12). In urban areas it is mostly organized together with the general secondary school as a single unit. The middle school, like the grammar school, ends with the *Matura*, the advanced school leaving certificate. Since 2000 this has become an increasingly centralized (national) examination. Within middle schools there is a differentiation based on pupil needs: those who have difficulty in learning and focus on more practical activities and those who are working toward a more academic education. This implicit polarization has led to some types of school – grammar schools and youth schools, for example – being founded.

28.3.6 Grammar Schools: Gymnasiums

The gymnasium – Lithuania's grammar school – lasts 4 years and conveys a deeper, more profiled education. There are also many specialist gymnasiums. Teachers are highly qualified in their subjects. Pupils learn in individual profile and elective programs. These gymnasiums now give young people the choice between a certain number of alternative education facilities. Despite some misgivings about the introduction of the gymnasium, their numbers have increased eightfold in the last 5 years.

In Lithuania, there is a growing tendency to improve the transfer between, and the dovetailing of, educational sectors – namely, academic and vocational education. On top of this, there is a growing tendency to improve coordination between general, vocational, and higher education. Technology gymnasiums have become

integrated in vocational schools, for example, providing a general education and prevocational training without awarding any vocational certificates or qualifications. Young people acquiring such an advanced school leaving certificate from a gymnasium are free to decide whether to start studying at a university or to stay at the same school and continue with a vocational education program.

28.3.7 Youth Schools

Youth schools are general education schools for learners with specific problems in terms of motivation or learning difficulty. Learning processes at such schools are individualized, and learners are provided with special educational-psychological assistance. Practical content plays a key role in the curriculum of these schools. Very often pupils come from socially disadvantaged families that have tended to neglect their children's education. Many of them also need material support. The aim of such schools is to help pupils rediscover their motivation to want to return to general education schools or to continue learning in vocational schools. The country now boasts 22 such facilities. Most of these schools have become centers for adult education that are not only active in general education but also provide services for nonformal education. In some middle schools, classes (adult education classes) have been established for educating poorly motivated young people. Schools for adults often have a shortage of learning materials adapted for adult learners, and not all teachers have been prepared for working with adults.

28.3.8 Vocational Education

The most important providers of vocational education are *vocational schools* (which run programs in the most important areas of vocational education), *colleges* (which run programs for nonuniversity-based tertiary education), and *upper schools* (for programs leading to the middle school certificate and for post-secondary certificates that are not university degrees). In the meantime, upper schools are in the process of being discontinued as a separate facility, and remaining schools are gradually being converted to vocational schools.

Basic vocational education can run parallel to the middle school certificate for young people from the age of 14. Vocational education programs recognize (accredited) modules from upper schools or universities and vice versa.

Since the implementation of the Law on Vocational Education Act in 2004, vocational facilities have been restructured: from budget schools to public schools and schools in private ownership. At the same time, a legal framework has been established to increase the number and type of school-maintaining bodies. As part of the decentralization process involved in administering educational institutions, eight vocational schools were awarded public institute status. Maintaining bodies with the same rights as the Ministry of Education and Science include counties, district and municipal authorities, employee associations, other social partners,

research institutes, and companies. In 2004, three vocational education centers were established that now make it possible to react more flexibly to ever-changing market conditions and to effectively deploy available staff and material resources and funds earmarked for vocational education. In a bid to adapt vocational education better to the requirements of the market, 55 restructured training standards for vocational education were drawn up and accredited. The qualifications are itemized in a system of national vocational qualifications issued by the Lithuanian government.

Following a principle of regionalization, a network of state colleges (providers of tertiary education without the power to award degrees) has been established to improve the quality of tertiary education and to make vocational education more appealing. And to enhance the network of vocational training, regional education centers have been established. These aim to bridge the separation of education sectors (in particular between general and vocational education); strengthen the relationship between academic and technical learning; strengthen the connection between formal, informal, and autonomous education; and recognize skills acquired informally and independently.

The first technical gymnasiums were set up in 2000, offering a more technically oriented advanced school leaving certificate. Technical gymnasiums provide middle school elements and preparatory vocational programs prior to actually starting vocational education. Graduates receive the advanced school leaving certificates, which give pupils the option of continuing with the relevant vocational course or studying at a university. Technical gymnasiums provide a more effective link between vocational and general education while motivating young people to learn. At present, two private vocational schools and five private centers for vocational training have been accredited.

28.3.9 Tertiary Sector

Within a short space of time, two major reforms were implemented. In 1991, upper schools were set up along the lines of Soviet technical schools, and in 2000 a network of colleges was established based on these schools.

In Lithuania there are currently 49 institutes of higher education: 6 non-state universities, 12 non-state colleges, 16 state colleges, and 15 state universities. The priorities of Lithuanian education policy have been strongly influenced by the Bologna process. This led to the setting up of a joint task force made up of universities, colleges, and the center for the evaluation of quality in higher education.

Degrees may only be awarded by universities and universities of applied sciences. Courses at a university of applied sciences lead to the award of bachelor degrees. Universities offer degrees at three different levels: bachelor degrees, postgraduate degrees (master degree or specific professional qualifications), and higher professional qualifications (*residentur*), research qualifications (*doktorantur*), and artistic qualifications (*aspirantur*). Higher education courses

are programs accredited by the Ministry of Education and Science. The quality and efficiency of professional programs and academic and research courses are subject to regular evaluation conducted by the center for the evaluation of quality in higher education.

The scope of a higher education course is measured in credits. One credit equates to 40 h of learning (in lecture rooms, laboratories, independent learning, etc.), i.e., a full working week. A credit awarded in Lithuania is the equivalent of 1.5 credits of the European Credit Transfer System (ECTS).

28.3.10 Adult Education

The European Commission report of 2004 on the status of the implementation of its General and Vocational Education 2010 program records that on average 8.5 % of Europeans between the age of 25 and 64 taking part in the study attended adult education courses and that in Lithuania the average was 4.5 %. The Lifelong Learning Strategy 2004 and its implementation schedule are documents that try not only to rethink the work of education institutions but also to reorient the whole education system toward lifelong training. It aims to employ more people on the labor market and to invest more and efficiently in human resources and lifelong learning. In this document measures are listed which provide everyone with the skills to help them achieve professional success and help remove obstacles to the labor market.

Particular attention is given to extending the education infrastructure by investing in facilities that not only provide vocational training but also professional information, orientation, and advice. The schedule for implementing the lifelong learning strategy provides for guidelines to be compiled to set up mechanisms to evaluate and recognize skills acquired in nonformal learning or learnt independently, to increase participation in education (e.g., by giving adults a second chance who do not have a primary school or middle school leaving certificate), to contribute to expanding the infrastructure (e.g., by renovating and constructing buildings, replacing basic technical equipment, expanding information system, and increasing the skills of trainers), and to enhance the coordination system of lifelong learning. In the meantime, the Ministry of Education and Science is trying to raise public awareness of the need for and of opportunities available for lifelong learning (particularly in remote regions) and has strengthened the management of the issue (e.g., through the public information, advisory, and orientation system, AIKOS, which is available to everyone).

Lifelong learning for older people is made difficult by the low demand for such people on the labor market, low income, and the lack of motivation. *Universities of the third age* aim to help public organizations and the state to correct the situation. The state has provided the framework for people to gain a general school certificate and vocational and higher education free of charge. In an effort to avoid social exclusion, there are special programs that support the integration of young, unemployed, and unqualified adults in the labor market, for the long-term unemployed

who do not have a profession, for older employees (55 and older), for the disabled, and for people from ethnic minorities (including Sinti and Roma).

28.4 Developments in the Current School System

28.4.1 Quality Assurance Measures

The document *Defining the Measurement of Performance and Achievement* approved in 2004 is central to the measurement of pupil performance and achievement. The following documents form the basis for the new definition of the measurement, measurement as a process and as an aid to learning: *The General Programmes and Standards of Education* (2002, 2003, 2008), *General Education Plans* (2008–2009), *Definition of Primary Education* (2003), and *Programmes of Leaving Certificates* (2003).

A ten-point system is used to measure pupils who are following programs of primary education and lower secondary education. Schools are free to choose any other system but would then subsequently have to convert these results into the ten-point system. Achievement and skills in electives can either be measured with a numerical mark or with the entry completed or not completed; for subjects such as ethics or religion, sport, art, and technology, it is however recommended to use the entries completed or not completed to measure achievement. Pupil achievement and progress are measured at the end of a course, of a module, and of a primary school or lower secondary school program. There are two types of measurements in the education process: formative and diagnostic (depending on the educational goals pursued, a general measurement, a measurement based on criteria, and a measurement based on standards are used). Measurements of achievement and progress mainly focus on educational standards. For pupils with special educational needs, content is individualized and standards applied at the discretion of the teacher. At the end of a program, a general measure of achievement (a summary evaluation) is made – a formal evaluation that is either fixed with a numerical mark or through another form (test, examination, or any other form of measuring achievement). The type of measurement is used to generalize learning results upon completion of a program or module.

The Lithuanian National Examination Centre organizes the *Matura* examinations – national examinations and school tests in biology, chemistry, physics, history, IT, Lithuanian language and literature (as native or second language), mathematics, and foreign languages (English, French, German, Russian). School tests are carried out in other native languages (Belarusian, German, Polish, Russian) for art, geography, and music. To pass the *Matura* certificate, each pupil has to take three examinations: a compulsory examination in Lithuanian language and literature and two electives attended based on programs the pupil has selected. Besides Lithuanian, school leavers can elect to take up to five examinations. Examinees can choose the type of *Matura* examination themselves – either national or school-based examinations.

The education system is monitored based on the supervisory framework of the country's education system and the monitoring criteria list of the education system. Most measures to introduce a nationwide monitoring system for education are currently being carried out by the Ministry of Education based on the Education Improvement Programme. Plans are also afoot to establish an Education Information System to be used by school managers at all levels in their decision-making. The aim is to improve overall the analysis of the education system and to make education policy more transparent. There will also be a national system of measuring pupil achievement, with tests in Lithuanian, mathematics, natural and social sciences for pupils in Years 4, 6, 8, and 10. A system of internal and external evaluation will also be compiled and introduced.

The Internet site for the Education Information System was set up in March 2005, a new and effective medium for all those interested in education. The system helps to analyze issues of the quality of education and to make decisions that affect the implementation of the education strategy. The system publishes all the data that were gathered in many different databases and is part of a system monitoring the development of the national education system. In the meantime, reports on the state of the country's education system for 2000, 2001, 2002, and 2004 have been published. Every 2 years a summary of these reports is compiled in English, briefly analyzing specific problems and preparing alternative solutions to them.

A nationwide system to review pupil achievement is currently being compiled and elaborated. In 2002, pupils were examined in Lithuanian as a mother tongue and in mathematics. Since 2003, results of pupil achievement in Years 4 and 8 or in 6 and 10 are analyzed for Lithuanian as a mother tongue, mathematics, and natural and social sciences. The results are included in the report on the state of the education system.

The aim of the Methodical Vocational Education Centre is to gather and publish information, including statistical data, on vocational education and its relation to the labor market. The Centre conducts an evaluation of the quality of the learning process in vocational schools, higher schools, and colleges. In addition, Lithuania takes part in international studies, including TIMSS, PIRLS, ICCS, SITES, PISA, TALIS, and ESPAD.

28.4.2 Dealing with Special Problems

The Ministry of Education and Science and its bodies implement measures relating to various national prevention programs. The aim of the programs is to help teachers to identify children at risk at an early stage and to offer them assistance. Prevention activities largely tackle violence among children, criminality, prostitution, the risk of suicide, and other negative social and psychological incidents. Statistics gathered over the last 3 years on teenage criminality indicate that the situation is becoming stable. Experts have tried to solve the problem by offering young people more intensive employment and expanding the field of activities for young people, by discussing educational and legal issues publicly, and by involving

parents in preventative measures. Programs have been carried out in recent years in collaboration with social security offices, health, education, legal and other institutions, public authorities, district and municipal authorities, social organizations, and individuals. Schools have set up groups for preventative measures, and in the district and municipal authorities, coordination groups have been established. Lithuania has a tradition of employing school pupils during the summer holiday. There is a program to prevent criminality among children and young people during puberty and a program for targeting employment. Funding was provided from 2005 to fulfill the programs. Roughly 300,000 children and young people take part in these programs each year.

28.4.3 Measures to Integrate Immigrant Pupils

There is a growing trend for immigrant pupils to go to general education schools. As a result, papers were approved on the education of children from minorities, e.g., the strategy to develop the education of minorities in Lithuania or guidelines on the design of language lessons for ethnic minorities in the middle school. A recent study established that the number of learners in the languages of minorities is declining. This may be a result of measures to improve integration in the national culture of Lithuania.

28.5 New Developments

Issues related to general education, professional training, quality of studies, pedagogical personnel, sponsorship of schools, and accessibility of education are defined in the National Education Strategy for 2013–2022.

1. Problem *Quality of general education*: According to international research on learning, Lithuanian students are average achievers. The quality of work in schools at different stages varies: the quality of primary education is considered to be high; however, the achievements of 15-year-old pupils are lower than Europe's average.
2. Problem *Quality of professional training*: Qualifications provided by professional training do not satisfy needs of the labor market. In times of intense change, the State is not capable of renewing the infrastructure and programs of professional training and of preparing teachers pedagogues quickly enough.
3. Problem *Quality of studies*: The prestige of higher education in Lithuania is confirmed by the percentage of university entrants; in 2011, 66 % of all students who graduated from school started to study at institution of higher education.
4. Problem *Teacher numbers*: The teacher-pupil ratio in Lithuania is positive: one teacher to every eight pupils (EU's average is one teacher to 12.2 pupils). However, because the majority of teachers are around 45–50 years old, after 15 years there might be a shortage of teachers.

5. Problem *Principles and models of sponsorship of schools*: The system of general education provides education vouchers which ensure salaries for teachers; however, it does not induce schools to improve their work. In the system of higher education, the necessity to attract students is inducing educational institutions to improve their images but not the quality of studies.
6. Problem *Independence and accountability of schools*: There are liberal national regulations for school activities. However, the order of budget planning and organization, which is applied for educational institutions, is restricting the heads of institutions and depriving them from opportunities to work independently, ruining their motivation and initiative.
7. Problem *Accessibility and inclusion*: Preschool education is not compulsory; preschool education participation scores lower than EU's average. The informal education of children complements formal education and aims to develop their individual skills and abilities to satisfy their needs of self-expression and to develop their personalities in general. It is essential for groups that are risk of social exclusion and for children with exceptional abilities. Participation in informal education is not sufficient; education itself lacks variety; there is little harmony between formal and informal education and inadequate financial support. The level of education of adults is lower than Europe's average; it does not even meet Lithuania's own previous plans. The education of adults is voluntary and affected by quality and variations of supply to meet the needs of potential learners, by its accessibility, and by the ways of learning, prices, and financial support.

The essential guidelines for developing the educational system in Lithuania contained in the National Education Strategy are (1) quality of education (depending on organization and financial support for education, contents of education, teacher skills, infrastructure, culture of organization), (2) status of teachers (to increase the prestige of teacher's profession and educational studies, to increase their salaries, to improve their working conditions), and (3) lifelong learning (to improve the variety of services, to develop the informal education, to create system of acknowledgment of competences and qualifications, to provide services of career planning).

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Siggy Koenig

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The chapter below reflects developments up to 2010.

S. Koenig (✉)

Ministere de l'Education Nationale et de la Formation Professionnelle, Luxembourg, Luxembourg

29.1 History and Social Parameters of the Education System

29.1.1 Cornerstones of Historical Developments

The ability to learn languages at school marks the strength and weakness of a school system for a nation that has always felt it has been straddling the Roman and Germanic cultural and linguistic divide. The territory of Luxembourg has grown on both sides of the linguistic border that has run through Europe since the end of the Roman Empire. Only in 1839 when neighboring Belgium gained independence and the French-speaking part of the territory of Luxembourg was absorbed into the new state did the Luxembourgish-speaking population find themselves once again within a closed territory.

Nevertheless, the decision to remain multilingual was a political one. Although the fact that the people speak Luxembourgish as their first language was never ignored, the decision was made to retain French as the language of administration, law, and politics. In schools, pupils learn reading, writing, and arithmetic in German; French is taught from Year 2. This is undoubtedly a far-reaching decision that spawned generations of multilingual managers in business and administration, trained in German and at French-language universities, but it is a major burden for generations of pupils from less educated or immigrant families and is seen as the major feature of the selective nature of Luxembourgian schools.

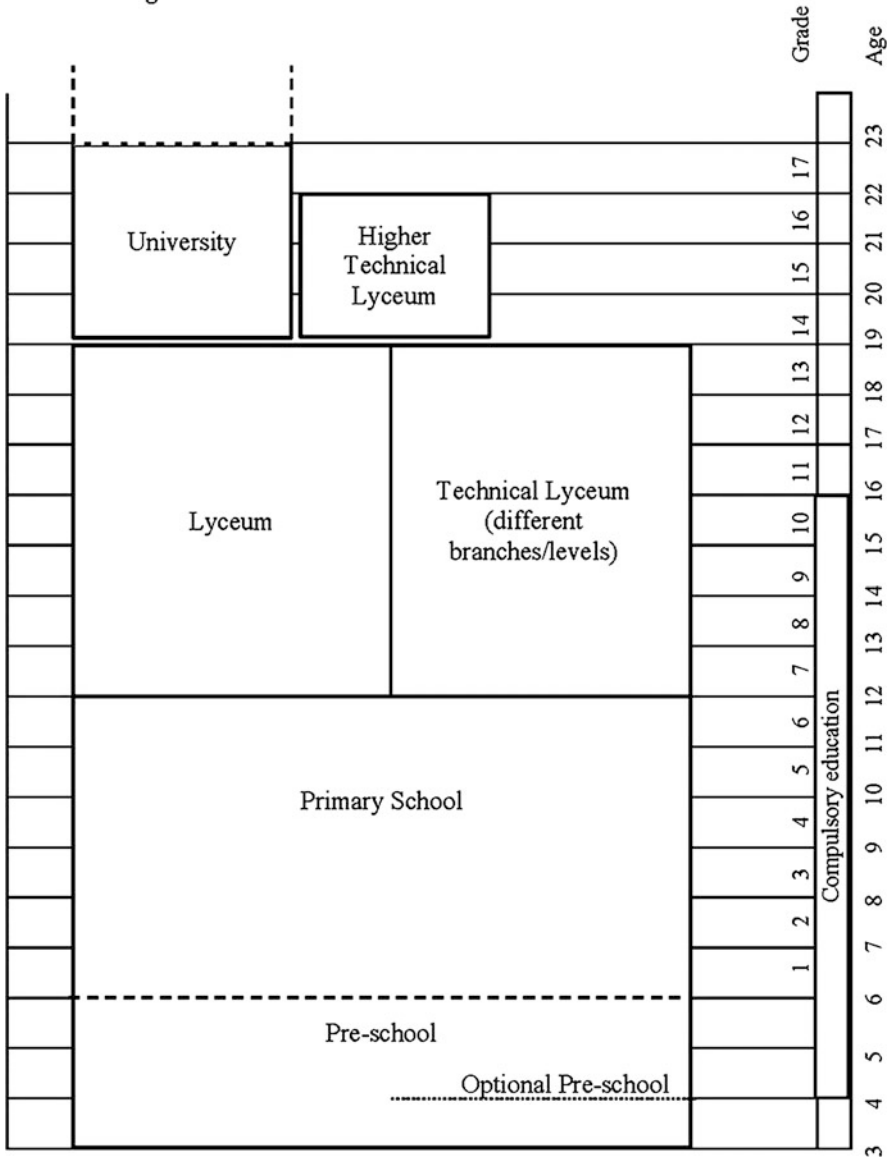
Between 1848 and 1912, the state took over responsibility for schooling and education and laid the foundations of Luxembourg's school system. Compulsory schooling lasts 9 years. Children are taught together in a 6-year primary school. A minority – as many as business, science, and administration needs – then attend grammar school for 7 years. Initially, they principally learn Latin and Greek, then increasingly more French, German, and English and later natural sciences in accordance with the educational requirements of the upper and middle levels of school. The remaining pupils – roughly 60 % of school children – spend the rest of compulsory schooling in secondary education.

With the emergence of the iron industry at the beginning of the twentieth century came the call for vocational education and the provision of a course of study that was not subject to grammar school requirements but which clearly distinguished itself from previous schooling. This three-pronged school system remained unchanged for the whole century.

Between 1848 and 1912, Luxembourg also regulated its relationship to the Catholic Church, whose influence on lessons and the appointment of staff had been drastically cut, but which had also been given the guarantee that Catholic religious education would not be touched.

The fathers of the 1868 Constitution regulated the question of the relationship to private school facilities in a particularly unique manner: they just simply ignored it, and while the duties of the state in setting up schools were defined, the freedom within lessons was not afforded a single word. However, this did not mean the role of the Catholic private school for girls could be questioned.

Luxembourg



On a territory of just 2,000 km², decisions on school policy can be made relatively pragmatically and relatively quickly. However, this directness also means when protagonists mix with each other on a near-daily basis, key questions regarding the teaching of values, early selection, and the choice and weighting of languages often turn into derisive conflict that not only deeply divides society but also makes it virtually impossible to reach consensus.

29.1.2 Key Phases of Reform and Innovation

In the 1960s, the pressure that emerged from the increasing educational needs of a growing proportion of the population led to a range of attempts to change entrenched structures. In 1965, a 5-year secondary school (*collège d'enseignement moyen*) was established that pursued a middle line between grammar school and vocational education. In 1979, all education channels that led to a professional qualification – vocational education, the training of technicians, technical colleges (including agricultural, hotel trade, and commercial colleges), and the secondary school created 15 years earlier – were integrated in a new, larger structure, the technical secondary school. The introduction of a technical baccalaureate (*bac technique*) was almost revolutionary and opened a second path of access to higher education. This was a remarkable social achievement for its time. In retrospect one cannot fail to notice that because of this the grammar school escaped the attention of all reform efforts that perhaps should have arisen in the context of integrating children from immigrant families.

In 1994, complementary classes that to date had been organized by the municipalities were absorbed to technical secondary education. This abolished the tripartism of the system, and answers to the completely new challenges of the huge growth in pupil numbers and the heterogeneity of the pupil population now had to be found in the bipolar interplay between grammar school and technical secondary education.

29.1.3 The Political, Economic, and Cultural Framework

29.1.3.1 Cultural Framework

The language issue has gained such a level of importance in the collective consciousness of the Luxembourg people that Luxembourg can be described as a nation of languages. Their identity is expressed not only in their ability to speak Luxembourgish, German, and French equally well but also by the fact that Luxembourgish has been raised to the level of a national language. The awareness that multilingualism is essential grew from the 19th century with increasing trade relations and from the growing mobility with the close German and French neighbors. The fact that, in all this multilingualism, Luxembourgish could hold such an important position was anchored in the collective consciousness in 1941 in the resistance movement to the cultural embodiment operated by the Nazi occupiers during the Third Reich.

Firmly anchored is also the belief that social mobility is achieved through school-based success. There is hardly a single example of public figures that did badly at school but still managed to succeed in life. Those who believe that social mobility is only possible if pupils are treated absolutely equally will find it difficult to accept differentiation in education that requires adapted and uneven attention given to pupils.

Especially if such people also believe that only pupils who have passed all subjects without exception, even if only with mediocre marks, should be awarded certificates and diplomas. The angst generated in possibly producing excessive numbers of highly qualified school leavers and academics has characterized school politics throughout the whole of the twentieth century. In a time of greater internationalization in which the number of recognized school certificates acquired in other, more open, systems is increasing rapidly, this selectivity is often criticized as being counterproductive for the countries' own population.

29.1.3.2 Socioeconomic Framework

The socioeconomic and cultural panorama of the Luxembourgian population, and with it its school population, is atypical for a postindustrial European country. In the past 35 years, the population has risen from 340,000 to 484,000; during the same period the number of pupils and students has risen from 62,000 to 90,000 or 43 %. This growth was mainly due to an inflow of immigrants and greater internationalization. It also culminated in a unique situation: in 2007 50 % of pupils did not speak Luxembourgish as their mother tongue.

The challenge now facing schools of combining integration, equality of opportunity, and quality will not diminish if we also take into consideration that a large proportion of people employed in the Luxembourg economy (36 %) commute daily from France and Belgium. Accordingly, companies in Luxembourg can fall back on a virtually inexhaustible reservoir of labor from the greater region (Lorraine, Saarland, Rhineland-Palatinate, Province du Luxembourg), and, as a result, the pressure of expectation on Luxembourg schools in terms of the quality and quantity of education is kept to a minimum – unless they are looking for multilingual staff.

29.2 Fundamentals, Organization, and Governance of the Education System

29.2.1 Current Educational Policy

In the last few years, school policy has been dominated by the view that the organization and daily practice of schools will have to change if it hopes to keep pace with social developments and maintain its role as a melting pot for a future consensus-seeking generation. Accordingly, current plans and initiatives take account of how best to manage the system, decentralize administration, empower school networks, and reshape content while balancing the dichotomy between improving quality and fostering social justice. School success is measured by the degree to which it manages to help each child gain a qualification in line with his/her capabilities while giving the child the feeling that the path is free of obstacles for him/her to develop their own potential. With this in mind, quality can no longer mean selectivity if this solely concerns assessing whether a pupil can write correct German and French at the same time.

29.2.2 Managing the Education System

The Constitution of 1868 expressed itself with its usual succinctness, anchoring the educational duty of the state and transferring to it the full responsibility for the organization of primary and secondary education. For all intents and purposes, the state is therefore the sole sponsor of the school system. The fact that 7.5 % of pupils attend a private school does not change the situation: except for the Europa School for children of EU civil servants living in Luxembourg, these schools are also supported by the state. This is also not changed by the fact that, traditionally, the state and the municipalities jointly maintain primary schools; new legal provisions stipulate that the state is to be responsible for appointing staff. All this is in line with the state's centralist tradition of national administration in which channels of information and decision-making are kept short.

This is not inconsistent with the progressive imported autonomy of schools introduced recently in which schools have been granted organizational freedom to schedule an approved amount of lesson time and limited educational leeway in customizing timetables and in the choice of teaching materials. In the medium term, the tasks of central administration are moving toward quality control, reserving the right to appoint teachers, allocate funds to schools, and organize centralized exams. Equipping school committees with new, extended competencies is also a move in the same direction. Progressively, the system is changing from one that thought it could regulate primary schools through inspectors and secondary schools through head teachers to a system of independence where the schools account for their own performance.

29.3 Overview of the Structure of the Education System

29.3.1 The New Fundamental Education

The newly created level of fundamental education (*école fondamentale*) comprises early learning and primary school.

29.3.1.1 Preschool Education

For a decade now, early learning has been accorded increasing importance in *éducation précoce* (early learning from the age of three, optional) and *éducation préscolaire* (preschool education: for children aged 4 and 5, compulsory). Since 2010, each municipality is obliged to provide the *éducation précoce*, and in fact, this form of flexible preschool is gaining in popularity with the number of children taking part in educational and playful activities since 2001 increasing by 30 %. In view of the growing heterogeneity of society and changing family life, the *éducation préscolaire* is gaining in importance. The state hopes the time spent in early learning will be used as intensively as possible in the interest of the child's development, his/her integration, and preparation for school. *Éducation précoce* and *éducation préscolaire* are an integral part of "fundamental education" and make up the first cycle of primary education. Specific frameworks or grids of skills

are compiled for all areas of child development – from fine motor skills to rudimentary logical thinking – and with the help of a dedicated observation chart, teachers, and carers can observe the child at play and in other interaction situations and identify development progress and/or deficiencies.

The organization into cycles provides for a more flexible approach to the transfer to the primary school; children who have achieved the respective skills earlier can transfer to the second cycle where they learn to read and write and learn the fundamentals of arithmetic.

29.3.1.2 The Primary School as Part of Fundamental Education

That the demands of the primary school, especially relating to the acquisition of German and French with their somewhat ambiguous standards, have been pitched far too high for a large number of children can be seen not least because of the high failure rate: at the end of the primary school, 20 % of children are older than the theoretical age for this level of school. The reform of the primary school envisages educational change by converting to skill-centered lessons and formative evaluation, and structural change by introducing three 2-year cycles with a division based on school years being abolished. From the second cycle, literacy usually involves learning the German language. For 50 % of children who do not speak Luxembourgish as their mother tongue, this is particularly difficult and is exacerbated by the feeling of helplessness among parents when it comes to the traditionally large amount of homework.

In the last few years, a number of projects have been developed with varying degrees of success that adopt a method of literacy that takes account of children who speak and do not speak Luxembourgish. French lessons begin from the last third of the second cycle, with six lessons per week. Based on the assumption that all pupils can understand Luxembourgish from the third cycle, lessons in Luxembourgish consist in developing pupils' reading skills in the language. Only a few basic spelling rules are taught. In addition, there is an option for pupils of Portuguese origin (20 %) to learn a subject in their native tongue.

29.3.2 Transition to Secondary Education

The transition from fundamental education to postprimary education, whether that is to the classical track or to the technical track, has proven to be increasingly problematic over the years. This has less to do with the change of school, with the difficulties inherent in finding your way in a new learning environment than with the significance of the transfer. This marks an educational equator, separating those pupils who visit grammar school (38 %) from the rest. In recent years, selection by entrance exam has been replaced by an orientation procedure which reproduces, to an even more refined extent, what the previous entrance exam achieved.

This transition is so difficult to reform simply because of its social significance; all school partners have issued regular calls to simplify the procedure, but these have always had to be postponed because of the lack of consensus.

29.3.3 Lycée Classique (Secondary Education)

Necessarily, discussion on the transition from primary to secondary education and the selection that takes place at this time also takes account of the division of lower level of secondary education into *lycée classique* and *lycée technique*, or grammar school education and technical secondary education. Given the challenges raised by the dichotomy between integration and external differentiation based on skills and achievement, attempts have been made again and again to find a solution. However, the increasing heterogeneity of pupils means that the divide between the necessity of using integration to contribute toward social cohesion and the desire to finally give skillful pupils free reins to learn is growing wider. The fact that selection by school type goes hand in hand with a sociodemographic distribution among the various schools is not likely to help merge school forms in any way. The social structure of pupil populations in the *lycée classique* is significantly different to that in the other lycées.

Since the failed attempts in 1974–1979 to introduce a common lower level system of secondary education that followed a comprehensive school debate that split the country into two deeply opposing camps, this issue of common learning has, at best, only been championed by those political parties that do not have governmental responsibility. Reform efforts undertaken in recent decades have been mainly concerned with shaping the upper level of secondary education and have tried to articulate a balance between a general school-leaving certificate and a specialization as preparation for university. In the meantime, seven specialist tracks are now available from Year 10, and the question now is whether the system has generated overspecialization with an accompanying bureaucratic organization. A project to redesign the upper level of secondary education in the form of obligatory and optional modules is now being considered.

29.3.4 Lycée Technique (Secondary Education)

From Year 10, technical secondary education actually begins to train pupils for a profession. It does this through three channels: vocational education (*régime professionnel*), a training track for technicians (*régime du technicien*), and technical education (*régime technique*). The latter ends with a technical baccalaureate, while the technician's diploma qualifies pupils to study a related course at a university of applied sciences. Pupils land in one of these three channels as a result of school marks at the end of Year 9. It is not surprising therefore that numerous pupils and parents are of the impression that a second form of selection is taking place.

In fact, those who find themselves in vocational education usually do not have any other choice. Nevertheless, this technical secondary education is the principle reason why the number of qualified school leavers has risen significantly. Recent efforts to reintegrate school dropouts in a training process have also shown rapid results.

A bill currently before parliament envisages a modular approach to vocational and technical education, thus extending the proportion of professional education.

29.3.5 Higher Education

The establishment of a university in 2003 was not primarily based on the desire to offer Luxembourgian students the chance to study at home. The University of Luxembourg arose from the need to foster and structure research and to cover demarcated fields of study such as European Law or International Finance and from the plan to turn post-secondary programs (primary school education, social welfare, engineering, pre-university pathway courses) into university courses and to integrate them coherently into the Bologna Process.

Furthermore, the young university was characterized by its international nature, by its bilingual education, and by the mobility of all concerned – the 4,000 students and the lecturers. Fields of research include data security, material sciences, biosciences, European law and business law, international finance, education, and Luxembourgian language and culture. In just a short period of time, the university has stirred very high expectations on the results of applied research based on local circumstances, which partly explains why the state has been granting significant financial support.

29.4 Developments in the Current School System

The numerous and varied reforms of the last 30 years can be classified in four key areas:

- The integration of non-Luxembourgian pupils
- The provision of vocational qualifications
- The change to pupil-centered education
- The expansion of higher education in Luxembourg

In 1989, following a long period of stagnation in the wake of ill-fated discussions on the introduction or not of a comprehensive lower level of secondary education, the reform congestion was relieved somewhat. The starting point for movement involved general stocktaking and a resulting medium-term program of reform. The picture of the “school of tomorrow” envisaged at the time was based on a forecast downturn in pupil numbers, expected to fall to 49,300 by 2010. In the light of an increase in immigration and expansions to programs, Luxembourg schools currently accommodate 90,000 pupils, 82 % more than planned. Even the forecast that the proportion of foreign children would stabilize at around 30 % proved wrong; today 50 % of children speak a native tongue that is not Luxembourgish. At the same time, findings showed that just 49 % of a student age cohort gained a non-secondary certificate or degree and only 28 % finished school with a university entrance qualification. Today, the numbers are 70 % and 47 % respectively.

29.4.1 Integration of Non-Luxembourgian Pupils

Given the steady increase in immigration, particularly from Portugal, it has been shown that doggedly holding onto a monolithic structure conceived of for pupils speaking a language related to German is blocking the path to a qualification for many young people in the longer term. This opening-up process has already taken 30 years and can still not be seen as finished. A radical division of the Luxembourg school system from the moment children enter school into German and French-language variations of literacy and training has occasionally been proposed, but the Luxembourgians and the international community itself always comes back to the traditional structure. Both sides are not capable of comprehending the impact of such decisions, let alone keep it under control. Almost as a trade-off, a great deal has been invested in differentiation, guidance, and in-school and out-of-school care.

Measures and activities in early learning are seen as particularly cohesive. In 1998 the *éducation précoce* was introduced in which children from the age of three were brought together and taught Luxembourgish. The assumption is that learning Luxembourgish made it easier to learn German later and thus did away with the need to divide the system. In addition, this *éducation précoce*, which gave children from a variety of backgrounds the opportunity – often for the first time – to play together and to interact with each other, symbolized the salad bowl of social cohesion which the Luxembourgian primary school was supposed to be.

However, public acceptance of programs in which courses were taught in French alongside traditional courses in German only arose later in school life, during vocational education; this was favored by industry while qualifications from foreign children proved less of a risk to cultural and social positions. In a further stage, courses were offered in French as part of the technician's certificate or of the *Bac technique*, and recently it has been possible for pupils to do their baccalaureate in French or in English as part of the *Bac International* program under the patronage of the International Baccalaureate Organisation (IBO) headquartered in Geneva. The rapid internationalization of the Luxembourgian economy has given rise to new groups of middle and upper class foreigners whose educational concerns are now a matter for public schools. Their needs can no longer be satisfied solely by the services provided by private international schools.

29.4.2 Provision of Vocational Qualifications

The significance of the creation of technical secondary education has already been mentioned. The introduction of the *bac technique* in 1979, the differentiation options provided in the lower level of secondary education, and the three-pronged system of the upper level of secondary education (*régime technique, régime du technicien und régime professionnel*) gave vocational education the required dynamism to allow pupils with a wide variety of skills to gain a qualification and to define educational aims that could be adapted to meet the real needs of industry without having to ignore more humanistic educational aims.

From 1990, most training professions were converted to the fundamentals of action-oriented learning and to the acquisition of key qualifications, only to be converted again in 2004 to a more skills-oriented modular form of education. This division into module provided for an intermeshing of vocational education and professional training and development that allowed each individual to gain a qualification based on his/her learning skills and motivation. That professional training and development could also be seen as an element of economic competitiveness can be seen in the substantial investments made in this sector by setting up training facilities (*Centre de formation professionnelle continue*), by the expansion of adult education services (learning foreign languages at the *Centre de langues*, web-based baccalaureate through an *e-bac*), by state investment in in-company training, and by a maximum of 80 days' leave granted to employees for training and development with the state reimbursing associated costs.

29.4.3 Change to Pupil-Centered Education

The change of focus in schools to take account of the pupils themselves was a major turnaround for a school system that for generations was fixated on results instead of processes and on learning materials instead of on the learner and on examinations (transition from primary to secondary school, transition from the lower to the upper level of secondary education, and the baccalaureate) held to be critical for a school career.

The revision of overloaded, partially inappropriate content of school subjects was subject to reforms instigated over several legislative periods – from 1990 to today – initially to stem falling motivation and counter the decline in school achievement but then also to raise the efficiency of education generally by focusing more on decision-making and responsibility. Findings that suggested that a system should actually been achieving more after 12 years of French lessons, for example, fell on deaf ears with people more willing to believe that the lowering of standards was due to the constant watering down of transfer criteria. The publication of the results of the PISA study triggered a kind of “Sputnik shock” through the country: the Luxembourg public had to face up to the fact that, despite their perceived discerning programs, pupils were still not capable of turning what they learned into practice. They now had to realize that besides structural changes and an ongoing adaptation of examinations and selection criteria, the what and how of lessons are equally important for the perception of quality in an education system. The initial simplified and naively formulated awareness that pupils need to be taught how to apply the knowledge they have acquired led to a major reform toward skill-oriented education and to approaches of a more formative form of evaluation.

By re-focusing on pupils the role of a teacher as a conveyor of knowledge could not remain unquestioned. Restructuring vocational education led to the revaluation of concepts such as team work, personal and school development, and social values. Discussions on the distribution of lessons and the acceptance of responsibility which were not directly part of the educational process and which were more or less seen as tiresome administrative work were tackled, but no final decisions have been made.

As policy makers began to understand the biographies of pupils and the fact that the traditional image of the family had changed dramatically within a generation, they began to question of the role of the school in upbringing.

Costs and family politics made it difficult to look for ways to dovetail education and upbringing and for a form of school organization that facilitated harmony between family and professional life. Only tentatively non-educational staff was appointed to schools. During the 2004–2009 legislative period full-day schools were piloted. Open from 7.30 am to 5.30 pm, they offered completely new opportunities to shape school learning and life together.

29.4.4 Expansion of Higher Education

From the outset, Luxembourg's position on higher education was characterized by pragmatic impartiality. Since the middle ages, professors, doctors, lawyers, priests, and later engineers studied abroad, mainly at Belgian, German, and French universities. Because the country is too small to ever contemplate establishing a full system of universities, the educational and personal value of studying at one or more universities abroad and the benefits of spending a longer period of time away from home were always highlighted.

At the same time, however, policy makers were not too keen on losing complete control over the education of an academic elite: up until 1968, all university candidates for education, medicine, and law had to attend a 1-year preparatory course in the country and complete their course by taking a Luxembourg examination. When these highly restrictive conditions were abolished in 1968, concentration was placed instead on recognizing degrees acquired from abroad. This recognition was subject to strict criteria, which, given the exploding number of masters' degrees as a result of the Bologna Process, was also fraught with difficulty.

29.5 New Developments

At present, the following developments are giving cause for discussion and raising special challenges.

29.5.1 Language Reform

In Luxembourg schools, the transition to a school of success for everyone in line with the capabilities can only be achieved given the fundamental reform of language lessons. Initial moves were made in this respect in 2004 with the establishment of a profile for school language policies compiled in conjunction with the Council of Europe. The main aim itself of describing the skills to be achieved in the various language competencies (comprehension, writing, speaking) proved to be an extraordinarily difficult process simply because of the significance languages

have for national identity and economic competitiveness. On top of this was the highly charged requirement that pupils should achieve the same level of performance in German, French, and recently English too, levels that are only achieved by native speakers in other countries. In contrast, the progressive changes toward more skill-oriented education proved to be particularly helpful not least because it enabled realistic, empirically verifiable goals to be set and future differentiated options to be outlined. A process may possibly be introduced that leads to the development of plurilingual skills alongside the linguistic revolution in business and society.

29.5.2 Monitoring the System

From the very beginning it was clear that school autonomy was not just a matter of shifting responsibility to local bodies. It would actually involve a whole chain of reporting in which each level submitted regular reports on whether the goals it had set had been achieved. This is to be coordinated by the quality agency currently being set up by the ministry and the local university institute *Educational Measurement and Applied Cognitive Science* (EMACS). At system level, the university delivers analyses and reports on the monitoring process based on standardized tests in German, French, and mathematics, that are carried out at all schools in Years 3, 6, and 9. The data gathered by this evaluation is used by the quality agency to establish the framework for school development projects at school level.

29.5.3 Shortage of Teachers

Deeply damaging has been the shortage of teachers that has grown more acute in recent years. All its life, the Luxembourg school system was troubled by the fear of having a glut of teachers. Access to the profession was subject to conditions (academic and education qualification and knowledge of Luxembourgish, German, and French) that only permitted the exact number of teachers to facilitate the continuation of education for those numbers of pupils that were planned for – and these were in decline anyway. Since 1990, these plans have been fraught with error and the selection process all the more steadfast. If the opening of the profession was not to lead to a watering down of academic standards, policy makers would, for better or for worse, have to look beyond national borders, expand the recruiting radius, and take a leap of faith when it comes to language requirements.

29.5.4 Building Bridges to Families

All complex and discerning education systems place poorly educated families, or families who are indifferent to education, in a precarious position. Luxembourg's schools, which for a long time have never really found it difficult to integrate

pupils' parents in the life and impact of the school, are now – with the exception of the international schools – being confronted with an extremely high proportion of parents who have never gone beyond the lower level of secondary education. As school achievement is coupled with social origin, social aspects of integration are far outweighing linguistic aspects. Current considerations are looking to connect the learning of skills with citizenship and out-of-school care. The huge success of full-day school has shown parents that there is scope for improvement. A path which to date has hardly been developed lies in the collaboration of schools with support structures recently created by the family ministry, the *maisons relais*. And this collaboration between schools and *maisons relais*, which also includes collaboration between two highly different groups of professionals, between teachers and carers, and between ministerial bureaucratic organizations, is most likely to occupy the minds and emotion of those involved in the coming years.

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Wolf Oschlies and Wolfgang Hörner

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30.1 History and Social Parameters of the Education System

A sovereign state since 1991, the Republic of Macedonia (25,333 km²) was previously the southernmost part of the ex-Yugoslavia. It is however only one part of the historical region of Macedonia (68,451 km²) that belonged to the Ottoman Empire between the fourteenth and the twentieth centuries and which, in 1913, was divided between Greece (50.3 %), Serbia (38.6 %), Bulgaria (9.95), and Albania (0.2 %) (Stojmilov 2002). Today's Macedonia comprises the former Serbian part of Macedonia and has a population of 2,062,294 million (Statistics Office, MAKStat,

W. Oschlies (✉)
Kerpen, Germany

W. Hörner
University of Leipzig, Leipzig, Germany

as of 31 December 2012). In the region of Macedonia apportioned to neighboring countries, there are 700,000 who are culturally Macedonian and a further 300,000 in Europe and overseas. Although most neighbors diplomatically recognized the Republic of Macedonia in the early 1990s, the conflict with Greece over the name Macedonia meant that the country had to adopt the name “Former Yugoslav Republic of Macedonia” in the international community.

Macedonians in the Republic and in the diaspora speak Macedonian, the oldest Slav language; it is the mother tongue of the Slav apostles Cyril and Methodius who established the Cyrillic alphabet in the ninth century. At the same time, it is also the youngest official Slav language, only being officially proclaimed as such in August 1944 (Trautmann 1948).

Macedonians have always endeavored to maintain the cultural independence through the autonomy of the church, their schools, printers, etc. In the centuries of foreign rule, as with nearly all Southern Slavs, Macedonians could only hold on to two aspects to perpetuate their culture: their own family and their own church. The first schools evolved from the church and the national cultural “reincarnation” gave rise to the wish for political emancipation.

Macedonians only acquired full cultural decision-making responsibility as part of Tito’s federal Yugoslavia. Only after 1945 did they begin to tackle the traditional burden of illiteracy, which had stood at 83.8 % in 1925 and 3.7 % in 1953.

Compulsory education covering a period of 7 years was introduced in September 1944, but given the ongoing difficulties – the lack of unification of the Macedonian language and writing and huge shortages of teachers – it took years before this could be fully implemented. At present, approximately 95 % of children of compulsory school age actually attend school.

One of the reasons for the existing level of illiteracy is the multiethnic composition of the population. The census of 2002 revealed that besides the Macedonian (66.2 %), there are 23 other ethnic groups in the country including Albanians (25.6 %), Turks (3.8 %), Roma (2.7 %), and Serbs (1.2 %). Some of these groups do not have a tradition of attending school (Roma), while others (Albanians) are only now becoming school-goers. There is a growing tendency among Muslims to keep girls away from school from a certain age. Research conducted by the Office for the Development of Education, an organization working on behalf of the Ministry of Education and Science, on the ghettoization of ethnic minorities in 2013 produced some disconcerting findings. The report found that in 2013, 18,500 children did not go to school. Of these, 2,000 were victims of child labor, but 1,500 were not even recorded in birth registers.

The Law on Primary Education (1995) envisaged 8 years of compulsory schooling (7–15 years). This was amended in 2004 providing children with a “preparatory year” and 8 years of schooling, originally divided into 4 years of class-based education (*odelenska nastava*) and 4 years of subject-based education (*predmetna nastava*). Nine years of compulsory schooling were introduced in a further amendment in 2007 with children attending school from the age of 6 to 15 years. This is divided into three cycles.

Republic of Macedonia

		Doctoral studies (least 2 years)		Master (least 1 year)		Grade	Age
		University (3-5 years)		University of applied science (3 years)		17	23
	16					22	
	15					21	
	14					20	
	Upper secondary general education	Art education (4 years)	Secondary vocational education (4 years)	Secondary vocational education (3 years)	Training for work (2 years)	13	19
						12	18
						11	17
						10	16
	Lower secondary education (Third cycle)					9	15
						8	14
	----- (Second cycle)					7	13
						6	12
						5	11
	----- Primary education					4	10
						3	9
	(First cycle)					2	8
						1	7
	Kindergarten						6
							5
	Nursery						4
							3

Upper secondary education is based on a law from 1995 and consists of grammar schools (4 years), technical schools (3 or 4 years), art schools (4 years), and school for the disabled (3 years). In addition, there is a 2-year vocational education. An amendment from 2007 formally made upper secondary education obligatory for each citizen.

30.1.1 Political, Economic, and Cultural Framework

In the former Yugoslavia, Macedonia was the poorest of the republics. Although it was the only republic not to be entangled in civil war in the early 1990s, it could not save itself from the severe economic consequences of the transition: high inflation (1992, 1,700 %), increasing unemployment (1991, 20 %; 2006, 36.3 %), and roughly 400,000 refugees from Kosovo in 1999. These consequences brought about an enormous collapse in GDP.

The economic situation began to improve slowly after 2002, visible primarily in growth figures of 6 % in 2008. However, since then, Macedonia has been caught in the grips of the global economic crisis. In 2013, economic growth stood at 2 %, with industrial production up to 2.3 %, agriculture 2.1 %, and services 1.7 %. Exports rose year on year by 5.7 % in the same year and unemployment fell to 31 %.

Despite this economic surge, Macedonia is still the poorest country of the states of former Yugoslavia. In 2010, 557,900 people lived below the poverty line with a further 717,000 just above it. Nevertheless, in 2010, the International Bank for Reconstruction and Development noted that the trends in the Republic were significant.

Macedonia is also fully aware that improvements in education are the key to driving an economy and eradicating poverty (Usunov and Taskovska 2004). The 2002 census revealed that 4.2 % of the Macedonian population had never attended school, and 6.8 % had not completed primary school. Overall, 35.1 % had completed primary education, 36.9 % secondary education, and 17.0 % tertiary education. Ten years later, in 2012, official labor statistics records significant improvements: the rate of those people available for work (i.e., those in employment and those seeking employment) without any form of education stood at 0.6 %, 3.3 % have not completed (8-year) primary education, 20.6 % have completed primary education, 53.8 % have completed secondary education, and 21.4 % tertiary education. Structural reforms have taken effect, recorded in the significant increase in the numbers of people that have completed secondary education and graduated from university.

This has a direct effect on unemployment statistics. In examining the relationship between unemployment and level of education, official statistics for 2012 reveals the following picture. Given a general unemployment rate of 31 %, in line with expectations, 48 % of those without education (2,844 people) were unemployed. Thirty-two percent of those who had not completed (8-year) primary education were unemployed – close to the general level – as is, the unemployment rate for those that have completed 3 years of upper secondary education (33 %).

Higher than the national average is the unemployment rate for those that have completed the 8-year primary education (without any further qualifications). Only the higher levels of education fall below the general rate of unemployment: 30 % for those having completed upper secondary school, 23 % for university graduates, and 15 % for graduates of technical colleges (these represent a relatively small group). Here, the general rule seems to be that the risk of unemployment statistically decreases, the more qualified a person is.

Territorial reforms instigated in August 2004 that replaced the 123 old districts with 84 new municipalities (plus the capital Skopje) and which gave these increased responsibilities for education, health, business, and taxation eased some acute problems, especially that of rural depopulation. The larger municipalities are making use of their extended powers, and this has, in fact, an effect on education: teachers' salaries (and the prestige of the teaching profession) are on the rise, and the same can be said for school-based infrastructure. However, the regionalization of education does have its downside. Urban-rural differences and differences in the developments between municipalities have deepened, and the quality of education and teacher qualifications has their noticeable regional differences.

Generally speaking, the population of Macedonia is falling and getting older: UN forecasts estimate that the population of Macedonia in 2015 will fall to 2.037 million; the proportion of 14-year-olds will fall from 19.2 % in 2006 and 17.4 % in 2010 to just 15.4 % in 2020.

30.2 Fundamentals, Organization, and Governance of the Education System

The education system in Macedonia has been largely public and centralized. However, the fact that the unemployment rate among 15 to 24-year-olds in 2006 hits 59.8 % and the bulk of unemployed people was those without or with minimal educational qualifications forced the system to look for new approaches to organizing the education system.

On 18 April 2006, the Macedonian parliament passed the comprehensive National Programme for the Development of Education 2005–2015. The tenor of the program was to facilitate the administrative and budgetary powers of the state to more educational service, promoting regional and legal diversity (e.g., private educational facilities).

In addition, the National Programme announced the creation of several new control committees in education: a state education inspectorate, a central institution for quality control and compliance, a state examination center as an institution to supervise all examinations from year 4, the Pedagogical Institute of the Republic of Macedonia with its own Office for the Development of Education and for basic research, and a center for vocational education to control content and quality. Since 2013, state education inspectors are allowed to visit school lessons unannounced to assess the class management of teachers – which has been heavily criticized by about one third of the teachers.

In the search for staff to remedy ongoing problems, educational planners set their hopes on the effects of the state's administrative reorganization from which it was hoped a dynamic local incentive development would result. The hope was for a positive chain reaction: better business would need better employees, better employees would improve business, an economic upswing would bring about greater investment in education, etc. If the state would loosen its monopoly over the curriculum allowing regions to stamp their own mark on curriculum design, and if the state would then transfer the funding of education to the regions, then education and local business would enrich each other, and better paid teachers would enjoy higher professional prestige. This hope partly bore fruit.

In order to gain additional funds, Macedonia forfeited previous iron principles that, for example, primary schools had to be mandatory and free of charge as guaranteed in the constitution. Article 45 of the Constitution of 1991 expressly prohibited private primary schools that demanded tuition fees for pupils. However, for some years now, some pilot projects and experimental schools have been approved. There are elite schools maintained by Anglo-American, Albanian, or Turkish sponsors with 50–200 pupils, mainly foreigners or children with dual nationality who can afford to pay 3,000–4,500 euros per year. These schools are controlled by Macedonia, and their certificates and qualifications are recognized by it.

30.3 Overview of the Structure of the Education System

Since 29 May 2007, compulsory schooling has lasted 9 years (from the age 6 to 15 years), divided up into three 3-year cycles (years 1–3, years 4–6, and years 7–9). By integrating the preschool year in compulsory schooling, there is the hope that starting conditions for school beginners will be better, saving children from failing and leaving school. Still, in 2004, 18 % of all school beginners did not attend preschool.

30.3.1 Preschool Education

Preschool education affects children from the age of 7 months up to 6 or 7 years. In 2004, only 20.4 % of all under sevens actually attended preschool facilities. In 2005, studies showed that only 11 % of 3 to 5-year-olds attended preschool facilities, rural children roughly ten times less than urban children. In other words, preschool facilities are mainly, and perhaps only, utilized in cities and larger rural communities.

30.3.1.1 Primary Education

Primary education (*osnovno obrazovanie*) is of strategic significance. As in all other European countries, it is supposed to embrace all children as much as possible – even children with special needs – and provides them with new cultural techniques and basic knowledge and skills.

Across the whole of Macedonia in 2002/2003, there were 1,010 primary schools, 668 of which were “local” schools covering only years 1–4. However, according to

official statistics, the number of schools for years 1–9 has fallen steadily, from 1,003 in 2006/2007 to 986 in 2011/2012. The same trend can be witnessed in the number of pupils, which has fallen from 231,497 to 198,856 in the same period. In contrast, the number of teachers has increased from 15,098 to 17,129. The teacher shortage of the past has yielded to a surplus of teachers that is now facing a decline in pupil numbers. Primary school teachers teach between 18 and 24 h per week; 78.5 % of all teachers teach just one subject, 18 % two, and 3.7 % three or more subjects. To date, there is no system of in-service training for teachers.

Although illiteracy in Macedonia has dropped dramatically based on the last censuses (1994, 5.96 %; 2002, 3.62 %), it is still high with some ethnic minorities (Serbs 3.8 %, Albanians 4.8 %, Turks 7.3 %, Roma 20.6 %).

30.3.2 Secondary Education

Upper secondary education (*sredno obrazovanie*) in Macedonia has a good standing. The new Law on Upper Secondary Education was passed in April 2007. Article 3 stipulates that this is obligatory for all citizens and provided free of charge in public secondary schools. Until 1 June 2005, secondary schools were strongly centralized, primarily in respect of curriculum and examinations. At the end of 2007, there followed a phase of decentralization that enabled a better, more flexible response to changes on the economy and on the labor market. A push in the right direction came from the country's relatively poor results in the PISA tests from 2000 to 2006 which showed that the mechanical learning of facts was not much help in applying knowledge learned from unfamiliar situations.

Transfer rates from year 9 of the primary school to the “mandatory” secondary school are not spectacular despite statutory requirements. According to official statistics, the transfer rate rose from 42.3 % in 2006/2007 to 44.7 % in 2010/2011.

This may be partially due to the fact that the transfer from year 9 of the primary school to the secondary school is complicated. The allocation of pupils to upper secondary general education and vocational schools is based on a point system in the primary school (*konkurs*): pupil preferences are approved according to their ranking. The number of places available clearly exceeds the number of applicants (for 2011, roughly 35,000 places for 25,000 applicants); one third of places are at grammar schools. The discussion among young people is whether it is more worthwhile pursuing a more prestigious grammar school-based education that cannot however guarantee a place at university or to follow vocational courses at a technical secondary school which is more related to the world of work but is less prestigious.

For the 91,167 pupils attending regular upper secondary schools in 2011, there were 7,298 teachers, 58 % of whom were female. Fifteen percent of female teachers are part-time staff.

Official statistics for 2011/2012 shows that 68 % of pupils in upper secondary school were taught in Macedonian, nearly one third (28.9 %) in Albanian, 1.7 % in Turkish, and 1.2 % in English. These official statistics are open to interpretation, however, as many schools are multilingual.

Lessons at grammar school (*gymnasium*) comprise core subjects, electives, and required electives. Core subjects make up 82 % of classes in the first year of gymnasium. This rate falls to 55 % by the fourth year of gymnasium. Pupils have more choice in the subjects they learn from the second year of grammar school. From a list of six subjects, pupils choose one which they want to learn as a required elective. From the third year in the grammar school, pupils can choose one of the three tracks – mathematics/natural sciences, languages/art, and social sciences/humanities – with each track containing two electives. The grammar school concludes with the *Matura* examination which is made up of the mother tongue subject, a selected subject, and an individual *Matura* project from either the core or elective subjects. In 2001/2002 and 2003/2004, new syllabi for all subjects were introduced and new textbooks compiled. The six Macedonian art secondary schools are somewhat of an exception which requires a test of pupils' abilities. Before pupils can attend music secondary schools, they must have attended music primary schools (*osnovno muzičko obrazovanje*). In addition to the public art schools, there are also private schools accredited by the Ministry of Education and Science.

For disabled children, there are secondary schools for pupils with special educational needs, with the nature and severity of the disability important in deciding which school the child attends and for how long. Children are given a special education tailored to suit their abilities and needs.

30.3.3 Vocational Education

Part of secondary schooling, the 2-year “training for work” program (*stručno osposobuvanje za работа*), learning at work, is a relic from the postwar industrialization drive. The program is offered for 45 different professions. The program was still included in the 2013 Law on Vocational Education as training for lower level work. Here, the program targets pupils who have not managed to complete primary education, providing them with initial job qualifications in 1 or 2 years and obliging them to complete their primary education in addition to the vocational education.

The situation is somewhat better in the 3-year vocational secondary schools that offer training in 91 different profiles. The curricula, defined in 1996, envisage 13–15 subjects for each profile divided up into 50 % general education, 30 % job-based theory, and 20 % practical experience. In many ways, the schools and their workshops are out of date. In 2003, a pilot project was launched in eight schools for mechanical engineering, car workshops, and electrotechnology which reorganized the nature of lessons: the number of subjects was reduced to 10/11, and general education, job theory, specialism, and practical experience were divided into four equal parts of 25 %. Specialist training was given in weekly blocks loosely based on the German dual (sandwich) system.

The 4-year vocational school offers programs for 24 professions, divided into 63 profiles. The whole concept for these schools stems from 1989, but has been in the process of reform with EU help. Numerous pilot projects are currently running trials. To date, there are no textbooks for specialist lessons – just internal scripts; for

the general education part of the programs, grammar school textbooks are used. Only since 2005/2006 have there been detailed syllabi and lesson profiles for all schools of this type. Programs conclude with an examination that entitles pupils to study the respective subject at university.

A legacy of old Yugoslavian times is the *specialist education*, appended to the secondary school as a post-secondary year to supplement programs for tourism, construction, electrotechnology, traffic, and mechanical engineering. Students have to have completed a 3 to 4-year secondary education and have 2–5 years' professional experience. In 1999/2000, 224 students took part in this particular program.

A recurring problem is that of textbooks. Their methodology is inadequate, especially for lower classes. According to the National Programme, there are no clear concepts and defined standards for textbooks. It is hoped that indirect improvements will result by expanding the teaching resources (PC, internet, CD-ROM), resources that will remove the monopoly textbooks enjoy today.

Reading the successive versions of the Law of Vocational Education from 2006, 2008, 2009, 2011, and 2013, it is clear just how much the state has washed its hands of its responsibility in this area, leaving it instead to publishers and “social partners.” There are secondary vocational schools (*sredno stručno obrazovanie*) that run programs leading to professional qualification level one, two, and three within 3 years, the secondary technical school (*sredno tehničko obrazovanie four years*) and the post-secondary vocational schools (*postsredno stručno obrazovanie one year after the secondary technical school*) that offer professional qualification on level four. Theoretical and practical vocational education is conducted in vocational schools and in centers for vocational education. Once students graduate from these schools, they can take more advanced courses, or if they pass the Matura examinations, they may start a technical undergraduate course at a university. Each course concludes with an examination. There are incremental examinations: “final certificate” (with or without the Matura), “specialist certificate,” and “master certificate” (*majstorski ispit*). Details are regulated by the competent ministry in conjunction with the chamber of handicrafts (*komora na zanaetçiite*) and other institutions.

30.3.4 Tertiary Education

Higher education is regulated by the law of 3 August 2000 and the law of 25 July 2005 and comprises degree, “postgraduate degree” and doctorate. A degree takes 3 years at a university of applied sciences and 3–5 years at a university. Postgraduate studies take 1–1½ years and lead to the award of a master's degree. Doctoral studies take at least 2 years. A new law is in preparation which intends to reform the whole higher education sector in harmony with European standards and criteria.

Macedonia has been a full member of the Bologna Process to harmonize European higher education since 19 September 2003. Initially, membership brought with it criticism, not least because the small country has *too many* universities; this is not only fragment scarce resources, it also restricts quality in education.

Macedonia has four public universities – Skopje (established 1949), Bitola (1979), Tetova (established 2004 as a state-recognized Albanian university), and Štip (2007) – and around 20 private universities, all of which were established after 2007/2008. These charge not inconsiderable tuition fees of 2,000 euros per year.

In 2002, Macedonia had 2,212 students per 100,000 people, one of the lowest rates in Europe. This figure is expected to rise to 3,500 by 2015. In recent years, the proportion of student of Albanian origin has risen to 16 %.

30.4 Developments in the Current School System

Macedonia is looking to become a member of the EU as soon as possible. Targets imposed on the country in terms of the economy, justice, administration, and security have by and large been met. In education, fundamental reforms are either in preparation or have begun. There are still significant hurdles to overcome, such as replacing obsolete machines in the training of technicians. On the other hand, modern information and communication technologies have gained an unexpectedly significant foothold. In 2003, only 27.4 % of Macedonian households had a personal computer; by 2010, it was 64 %. Of these PC owners, 89 % have access to the web, which is used intensively by children and young people (96–98 %).

In contrast, the National Programme also mentioned other weighty problems that are more difficult to remedy. This includes the notoriously underdeveloped “awareness among young people and adults of the significance of education”. In addition, there are discrepancies between urban and rural regions, differences in development between municipalities, the poor state of rural schools, the lack of qualifications among teachers, etc. Many of these shortcomings continue to exist today. As before, Roma persist in their traditional manner of staying away from schools, Muslims are reluctant to send their daughter to school from a certain age, and there are “families at risk” who cannot afford to send their children to school. Since 2008/2009, children who live more than 2.5 km away from school are to be transported free of charge or accommodated in hostels. From 2009/2010, all pupils are to receive textbooks free of charge. Other measures have been introduced to reduce the costs of education for families. The problem is that these have either not been implemented or implementation has been totally inadequate. Pupils sometimes have to wait months for their free textbooks or maybe do not receive them at all. In 2012, the government again pledged that it would tackle the implementation of these measures.

From 1999, preparations for the introduction of a national *Matura* (*državna matura*) were made. This was initially presented on 10 October 2005, but was subject to multiple amendments. It was only implemented in 2007/2008. The Ministry of Education and Science declared: “The national *Matura* has now been established for pupils from gymnasiums and from 4-year vocational schools. In addition to concluding secondary education, it serves as a means of selecting candidates to matriculate in higher education.”

The old problem of youth unemployment has only seen slight improvements. While in 2006, unemployment among 15 to 24-year-olds reached 59.8 %; in November 2013, it stood at 50 %. From another perspective, 45.8 % of all people registered as unemployed are between 15 and 29 years old.

30.5 New Developments

Education discussion in Macedonia currently focuses on two fundamental questions: how can an education system that has largely been inherited and which has undergone relatively little reform be adapted to meet the needs and the (part) results of system transition? What must a modern European education system look like to help – easily and sustainably – overcome the inevitable difficulties that arise in this transition?

Back in 2007, the Ministry of Education and Science published its vision for the near future. Key points included the computerization of schools, the introduction of religious instruction in the education system, the construction of new schools and sports facilities, the introduction of compulsory upper secondary education, the introduction of private primary schools, the introduction of in-service training for teaching staff, the development of an information system, provisions for implementing lifelong learning, increasing capacity for career guidance, and ensuring free and mandatory preschool facilities for all children, especially in the final year before school commences.

Six years later, these aims are far from being achieved. The reasons for this can be divided into two areas. On the one hand, ongoing drawbacks continue to stand in the path of progress. For example, for the last 13 years, *all* teachers should have had an academic education, but still more than 60 % of all primary school teachers *do not*. It is with some concern to notice that the teaching profession in Macedonia is becoming more and more a profession for women: in 1991, 51 % of primary and secondary school teachers were women; in 2002/2003, 55 %; and in 2011, the proportion of women in upper secondary schools was 58 %.

On the other hand, discussion provides a picture of inevitable change. A school not only needs teachers, it needs child care workers, psychologists, doctors, librarians, and other ancillary staffs. Their low numbers also give rise for concern. Specialist teachers have no, or very minimal, qualifications in education. This has a negative impact on the quality and the efficiency of classwork. In-service training is not regulated and is often left to the individual teacher. It is often seen as a disruption to school life and is hardly encouraged. There is no system of criteria or standards for in-service training, and it has no positive effect on a teacher's career. Nearly all teachers are treated the same and paid the same which basically contains their professional commitment. The Ministry of Education and Science is currently working on a new career ladder and salary tables which are intended to instigate change.

A major issue is the assurance and control of quality in education. To date, no comprehensive system of quality control has been installed. Instead, pupils' grades in examinations are used as the main indicator of quality. Education is still aligned

to pupils' regurgitating knowledge gained from textbooks. This cannot be the sense of qualitative education. Standards and criteria are needed that facilitate a permanent system of quality control of schools, teachers, lessons, and achievement.

In the light of these problems, in September 2008, the Minister of Education named four main aims as the next steps in the Macedonian politics of education: (1) completing the reforms in the 9-year education system, (2) preparing for mandatory upper secondary education, including reforms in secondary vocational education; (3) concluding the program "One Computer for Each Child"; and (4) reregulating professional careers for teachers and lecturers.

More recently, the Strategic Plan 2012–2014 instigated by the Ministry of Education and Science which explicitly refers to the National Programme 2005–2015 and sees itself in the role of evaluator of the Program's visions and results. There is still a lot to do, such as conducting the competition process for textbooks for primary and secondary schools – there are still no textbooks that the Ministry intends to provide to gymnasium pupils free of charge. The Ministry has listed other tasks. These include implementing the second phase of the decentralization process in education, namely, the transfer of responsibility to local authorities and more autonomy for schools, the development of conceptual plans for lifelong learning, the revision of existing curricula, restructuring higher education in line with the principles of Bologna and Lisbon, introducing market mechanisms, greater compliance with EU guidelines and the better use of EU funds, and increased security in schools.

For the schools themselves, tasks include improvements in education for rural regions and for "marginalized groups such as Roma and women," securing free school transport, free textbooks for all pupils, free accommodation in hostels, partner-like relations to NGOs, better rooms and technical conditions in schools, and in-service training for academic and ancillary staff.

The most ambitious area is surely the program One Computer for Each Child. With the highest investment in the last 17 years – as the Ministry emphasizes (but with much donated hardware, too) – tens of thousands of computers and peripheral equipment were acquired, giving hope to the development of additional learning impetus through the use of the Internet. In July 2008 (Skopje) and in August 2009 (Ohrid), two universities of information technology were established, providing specialists and specialist knowledge. By 2011/2012, 127 textbooks had been digitalized (available at www.e-ucebnici.mk). Generally speaking, the success of the program is however disputable. The PCs procured at great expense are only used for mathematics, politics, history, and geography, "but not particularly often". In October 2013, only 30 % of teachers actually used PCs, although there are fines should this equipment not be used (3,000 euros for the school or 1,000 euros for the teacher). The equipment that "collects dust" does not work properly and is willfully damaged or stolen.

The Ministry's other modernization plans include the *e-Matura* (part of the final secondary school examination conducted through electronic means); consulting parents; early socialization (improving preschool education); centers for adult education (especially for the noneducated who has few opportunities on the labor

market); international primary schools in Skopje with lessons in English, German, and French; self-help programs to enhance and renovate schools; electronic achievement controls; energy-saving schools; etc.

In 2011, Macedonia appeared to take a time-out from larger programs and proclamations. This time-out is to last until 2014, or longer, and is to be used to provide practical overhauling of schools. It is not effective to constantly talk about European criteria and standards when large parts of the school landscape are still deeply Balkan. For example, some have only now begun to notice that “in central Macedonia, there are regions in which there are no schools,” which is why thousands of children are forced to travel kilometers to attend schools in wider surroundings. This problem is to be addressed by building “modular schools” – simple school buildings each for roughly 100 pupils. By 2012, 11 modular schools had been built, and for the near future, another 14 are planned.

But new buildings are secondary compared to the latest reconstruction programs for schools, which has the doubled advantage of providing urgently need repairs and acquiring funds from the EU, Europarat, World Bank, and others to finance this. In the summer of 2013, the Minister of Education announced that his budget had increased by 60 % between 2006 and 2013 with a large proportion of it earmarked for the reconstruction of existing schools and the building of new schools.

Furthermore, at the end of September 2013, the Minister announced that 294 educators and psychologists would be appointed in Macedonian schools in the next 2½ years to strengthen educational components in schools. This is likely to make the academic function much tougher; in 2014/2015, the previous elective, mathematics, will become the third core subject for the *Matura* at grammar schools and from 2015/2016 at technical upper secondary schools. This is intended to counter the trend that (as in 2013) only 11.4 % of pupils chose mathematics as an elective, whereas 86.2 % chose English.

However, these measures will do little to improve the pessimistic mood prevailing among Macedonian teachers and their dwindling social esteem. Up to 1995, teachers were trained at universities of applied sciences, or technical universities, and then trained at education faculties at universities in Skopje, Bitola, and Štip. Professional motivation among teaching staff is in free fall: “torn between the obligation from endless reforms, in fear of education inspectors and not particularly well paid, the Macedonian teacher is becoming more dissatisfied with his profession” (TELMA-TV 4.10.2013). School reforms in Macedonia should not neglect teachers and their working conditions.

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C. Bezzina (✉)

Faculty of Education, University of Malta, Msida, Malta

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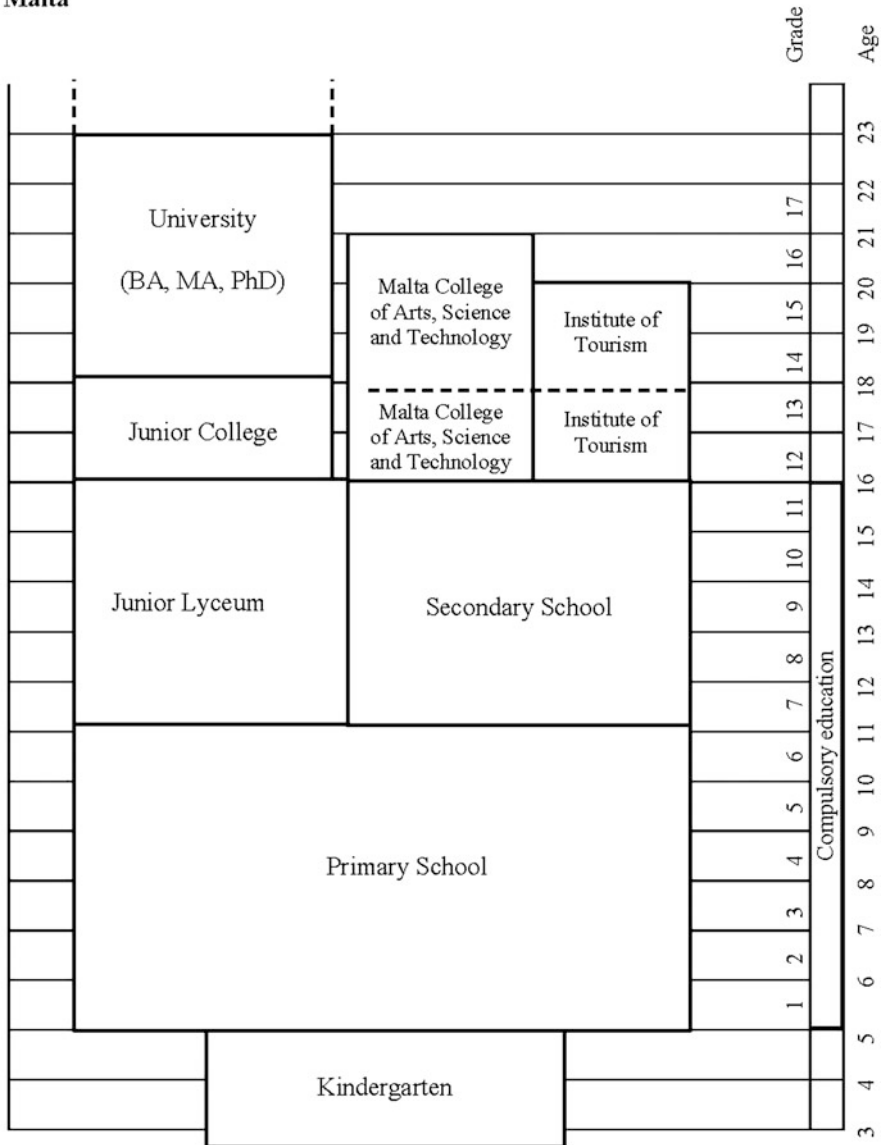
31.1 History and Social Parameters of the Education System

Malta is made up of a group of small islands; the two larger and inhabited islands are Malta and Gozo. It lies 93 km to the south of Sicily and 290 km to the north of the African coast. Its position in the middle of the Mediterranean and its natural harbors have attracted a number of colonial powers to take possession of the islands. As a result, Malta has an extremely rich cultural inheritance. With a population of around 422,000 people, Malta has the highest population density in Europe averaging at 1,200 persons per square kilometer (NSO 2013). Overall population figures are considerably increased by a heavy tourist inflow (estimated at around 1.4 million for 2012). Malta is a small nation with a distinctive language (predominantly Semitic) and culture. History and geography made its population cosmopolitan, while a flourishing tourist industry continues to reinforce this national trait.

31.1.1 Cornerstones of Historical Development

Education in Malta can be traced back to medieval times. In the 1850s, a model school for teaching was set up. The 1924 Compulsory Attendance Act enforced school attendance until the age of 12. In 1928, school attendance was raised to age 14 for students registered in state and private schools. The 1946 Compulsory Education Ordinance made primary education compulsory for all Maltese children between the ages of 4 and 14. Until 1970, Maltese pupils only had access to secondary education after passing the 11+ admission examinations or by enrolling in a private school. In 1970, secondary education for all was introduced. Secondary education was based on a system of selectivity. The more academically oriented children were channeled into the established schools which predated the reform. Students who failed the 11+ examinations and who previously stayed on in a primary school until they reached the school-leaving age were now grouped in the newly established state general secondary schools. The curricula of these new schools were effectively modeled on the needs of the students likely to leave school as soon as they attained the school-leaving age (Bonnici and Soler 2002). In 1972, the entrance examination to the state grammar schools was abolished, and all pupils proceeded from their local primary school to a secondary school in their area.

Malta



31.1.2 Key Reforms and Innovations in the Last 30 Years

Significant reforms have taken place at primary, secondary, and tertiary education levels over the past 30 years. The practice of streaming is still in use in Malta even in the primary school, where it is restricted since 1990 to Years 5 and 6. In the

church and independent sector, all children are taught in mixed-ability classes. At the primary level, 1981 witnessed the introduction of the junior lyceum entrance examination which led to the return of selectivity at 11+. Pupils who successfully pass this examination go to junior lyceums, whereas the others go to area secondary schools which are less academically oriented. In the secondary sector, we have witnessed major developments, with the main development being the raising of school-leaving age to 16 years in 1974 (Ventura 1996). Over the years, we have seen the establishment of a tripartite system made up of area secondary schools and trade schools set up in 1972 and of junior lyceums set up in 1981. In 2002, trade schools ceased to exist and students now attend area secondary schools. The Education Act of 1988 brought with it major developments. A national minimum curriculum (NMC) was promulgated for students from the primary school level to the upper secondary school level, and school councils were set up in an attempt to minimize the traditional and excessive centralization of the education system. Developments have also taken place at the postsecondary level with the setting up of two types of colleges: several which cater for the academically oriented students who want to pursue further studies (mainly at a university) and the Malta College of Arts, Science and Technology (MCAST) that runs various vocationally oriented courses. Through the passing of the Amended Education Act of 2006, further developments have taken place.

31.1.3 Political, Economic, and Cultural Frame of the Current Education System

The country's drive to join the European Union has led to a number of initiatives across all sectors of society. Education is at the forefront of such developments. The education system addresses the responsibilities connected with the perspective of European citizenship and the political and economic realities which full EU membership entails. The socioeconomic evolution that took place in the recent years is characterized in particular by the decentralization and globalization of ideas, by the emergence of an information society, by an intensification of the process of secularization, by a crisis of values and traditional lifestyles, by the threat to the physical and social environment, and by the challenges posed by demographic shifts.

31.1.4 Socioeconomic Context

The country continues to take on returning migrants, people of other nationalities who want to retire in Malta because of its conducive climate and refugees who are either seeking political asylum or a better life. While schools have opened their doors to all these types of foreign students, the country is as yet not in a position to

explore and analyze the existing systems that are in place to provide these children with an inclusive education and to study the impact that these children are leaving on the system at different levels.

31.1.5 Social Position of the Teaching Profession

There are three categories of the teaching staff: (1) professional staff who has been professionally trained either at a teachers' training college or the faculty of education in a university, (2) nonprofessional staff, designated as instructors, who possesses either a technical or vocational qualification or a number of passes at an ordinary level and one at an advanced level, and (3) supply teachers who are also enrolled in a number of subject areas and address existing needs. Entry into the professional service is at the grade of the teacher, which enjoys the same status as other professional officers (e.g., doctors, architects, and engineers) employed within the civil service. Preprimary level education is the responsibility of kindergarten assistants. Kindergarten assistants follow a two-year postsecondary course leading to the National Diploma in Early Years prior to employment. Primary, secondary, and postsecondary education is the responsibility of teachers having a good academic and pedagogical grounding. An initial teacher training (for both generalist and specialist teachers) generally involves a four-year Bachelor of Education honors degree course or a bachelor's degree in one or more subject areas followed by a one-year postgraduate certificate in education (PGCE). Both routes are offered by the University of Malta. On successful completion of the course, teachers apply for employment either within the state or the non-state sector. Within the state sector, teachers are employed as civil servants. Teachers may be asked to attend an in-service training annually. As from October 2007, newly appointed teachers have to follow a two-year mentoring period before being awarded the professional warrant as well as an induction course at the beginning of their professional career. The Council for the Teaching Profession was set up for the first time in July 2008; it advises the Ministry of Education on professional issues including the granting of professional warrants.

31.1.6 School and the Role of the Family

The participation of parents has always been evident in all sectors of education. The setting up of school councils in the mid-1990s saw the inception of an opportunity to bring parents closer to the educational programs that are run in schools. Parents are now being encouraged to actively participate in a number of "learning" activities so that they also partake of the responsibility they have for their children's education. One of the principles of the NMC is aimed at addressing the need to increase parental and community involvement in school life and educational matters in particular.

31.2 Fundamentals, Organization, and Governance of the Education System

31.2.1 Current Educational Policy and Goals of the Education System

The above challenges are of direct interest to those responsible for the planning of educational programs and to all those connected with the education process. The curriculum is to provide an educational experience:

1. Which promotes fundamental values among students: several studies (e.g., Baldacchino and Mayo 1997) have shown that the family is a key feature of the Maltese identity. From its early stages, education affirms the value of the Maltese family that is adapting to different ways of life. The family lies at the heart of the process of solidarity. Moral and spiritual developments are values that lie at the heart of social conviviality and understanding, within a context of multiculturalism.
2. Which facilitates their holistic development: holistic education acknowledges the interdependence of psychomotor, intellectual, affective, social, and cultural learning. The main aim of education is to facilitate children's overall development at all levels. Self-criticism, reflection, and cooperative efforts are essential skills for a lifelong learning.
3. Which motivates and prepares them to be lifelong learners: the concept of lifelong education entails that students emerge from the obligatory curricular experiences with skills and attitudes that enable them to continue to learn and live effectively and productively.
4. Which enables them to lead a full and productive life in a shrinking global village: an education with a global perspective allows students to realize that much of what is taking place in our country is conditioned by international events.
5. Which prepares them for the world of work where change is a fact of life.

The education system is to equip all students with a balanced mix of wisdom, knowledge, skills, and attitudes in order for them to operate effectively in tomorrow's world of work. Linked to this is the need to make good use of one's free time, by direct involvement in NGOs or by engaging in sporting activities and cultural pursuits.

The education directorates comprise all state schools and educational institutions. The Amended Education Act of 2006 lays down specific goals for the directorates, primarily to ensure an effective and efficient system of schools, ensuring education and training which are of relevance to the Maltese society. Within the terms of the act, the right of the individual to develop all his or her cognitive, affective, and operative skills is considered as a moral obligation on the part of society and a necessary investment in the continued development of the nation.

31.2.2 Basic Legal Principles

The Education Act of 2006 is the main legal instrument governing educational provision in the Maltese islands. In conforming to constitutional provisions, the state is responsible for the educational provision required by the act. In section 2 of the law, the duties of the state are (1) to promote education and instruction, (2) to ensure the existence of a system of schools and institutions accessible to all Maltese citizens catering for the full development of the whole personality, including the ability of every person to work, and (3) to provide for such schools and institutions where these do not exist. The law acknowledges the right of the state to establish a minimum curriculum for all sectors of the education system, irrespective of whether schools are administered by the state itself or by private individuals or organizations. Similarly, the state has the right to establish minimum conditions which both its own and private schools have to fulfill.

The law also recognizes basic individual and parental rights: “It is the right of every citizen (. . .) to receive proper education and instruction without any distinction of age, sex, belief or economic means” (Article 1). “It is the right of every parent of a minor to give his decision with regard to any matter concerning the education which the minor is to receive” (Article 4). “Education is compulsory between the ages of five and 16.” The Ministry of Education has the power to extend the period of compulsory education for certain courses as it may prescribe by regulation.

31.2.3 Financing

In spite of financial constraints that have also affected various aspects of development in Malta, the expenditure on education has been around 13.5 % of the GDP. In a context of reform, there has been a massive expenditure on building state-of-the-art schools and expanding the personnel within the newly set-up directorates.

31.2.4 Public-Private Schooling

Article 6 of the law provides any person with the right to apply to the Ministry of Education for the grant of a license to establish and operate a school. In turn, the ministry is obliged by the law to grant a license either where the applicant is the Catholic church (which represents the official religion of the country and which operates a large number of schools) or where the applicant is a voluntary society of a nonprofit-making character. In both cases, of course, the applicant has to ensure that the schools conform to the national minimum conditions. Church schools, which are almost entirely managed by religious orders, do not currently charge fees for primary and secondary education and are subsidized by the state which covers all their teaching salaries. Parents contribute term “donations” to cover other expenses. Students in postsecondary church schools are also paid a study allowance

as long as they have minimum qualifications established for entry into comparable state institutions. The independent (private) sector is made up of a number of preprimary, primary, and secondary schools. These are fee-paying schools and are usually run by a board of governors. Two thirds of the school age population attends the state (public) sector, whereas the remaining one third is in the church and independent sector. One can observe a steady growth in the independent sector over the past 15 years.

31.2.5 General Standards of the School Education System

In 1999, the national minimum curriculum (NMC) was introduced. The NMC is currently being implemented in schools. The principles of the NMC aim to provide quality education for all with respect for diversity, equity, and inclusion and with a focus on holistic education. To achieve this, the education authorities are further promoting a policy of decentralization and helping their schools establish their identity and autonomy. The NMC gives the schools the power and responsibility to review and modify existing educational programs so as to meet the needs of their particular students. In the process, parents and community involvement are encouraged. Currently, the challenges of decentralization are affecting schools and its members in diverse ways.

31.2.6 Quality Management

The management at the education division has so far fulfilled the major functions associated with managing a school, except for the actual day-to-day running of the school. To date, the Directorate for Education Services has been responsible for the following functions: recruitment, promotion, and deployment of staff; curriculum design and development and prescription; selection, procurement, and deployment of learning materials; design of assessment procedures; setting of annual examination papers; allocation of pupils to school; preparation of specifications, procurement of equipment, and its deployment; maintenance of premises and equipment; organization of national student activities; organization and running of in-service programs; and provision of school support services.

Given the move toward decentralization, we are seeing a concerted move to deploy greater responsibilities to the school and its community. Currently, the role of central authorities is being reformulated in order to take on a more regulatory function. Malta has started participating in a variety of international studies including PISA (2009), TIMSS and PIRLS (2011), TALIS, and the European Language Competence Survey. This is a major development as it will allow the education system to gauge standards as a result of comparative work.

At the end of compulsory schooling at age 16, students sit for secondary education certificate examinations which are set by the University of Malta. The options of sitting for foreign International General Certificate of Secondary Education (IGCSEs) and General Certificate of Secondary Education (GCEs) are still

available locally. At the end of postsecondary education at the age of 18, students register for the matriculation certificate which is made up of two subjects at the “A” level and three subjects at the intermediate level, plus Systems of Knowledge. This certificate, which is based on an international baccalaureate model, provides students with the necessary university entry qualification.

31.2.7 Teacher Training

In 1978, the faculty of education was set up with the responsibility of preparing teachers for primary, secondary, and postsecondary schools. The faculty runs a four-years bachelor’s degree in education (B.Ed. (Hons.)) and a one-year postgraduate certificate in education (PGCE) course.

The entry requirements for the B.Ed. (Hons.) course are the secondary education certificate (SEC) passes in Maltese, English, and mathematics, the matriculation certificate, and the European computing driving license (ECDL). The faculty of education offers two main strands with a primary or secondary specialization. That is, students pursuing the primary specialization course pursue a program that will lead to a teaching qualification to teach pupils either between the ages of 5 and 8 or between 8 and 11. Otherwise, they can pursue a teaching qualification to teach students between the ages of 11 and 16. Students in either course also follow courses in philosophy, psychology, and sociology. Each strand also includes a field placement component in each of the four years which includes observation sessions in the first two years and teaching practice in the final two years. For students to be eligible to join the PGCE one-year postgraduate program, they need to be already in possession of a first degree and be interviewed in teaching at the secondary level.

The faculty of education is proposing the move toward a master’s degree level of education for prospective teachers with the introduction of an M. Teach that would entail a full-time two-year program. Candidates would be eligible to pursue such a course on obtaining either a degree from the faculty of education (for those who wish to teach in primary schools) or a bachelor’s degree in a subject of specialization from another faculty.

Furthermore, the ongoing professional development of teachers provided by the university is of two kinds: (1) Certificate, diploma, or master’s degrees are offered by the faculty of education to those wishing to undertake advanced studies in education. (2) Training opportunities in specific areas are offered throughout the academic year. The education authorities provide teachers with varied opportunities to extend their skills and knowledge based on specific areas through INSET courses and seminars (Bezzina and Camilleri 1998).

31.2.8 Supporting Systems

In response to the principles of inclusion and respect for diversity, the Ministry of Education has, over the past decade, undertaken various initiatives to facilitate the

inclusion of children with learning difficulties in mainstream education. The provision of allocating a facilitator to provide assistance and required support to these children and the class teachers started at primary and is being extended to secondary. The government provides free education to the refugees who seek temporary asylum in Malta. Refugee children attend state schools in their local areas. These children qualify for the special support given to students facing learning difficulties (e.g., language, socialization).

31.3 Overview of the Structure of the Education System

Education in Malta is compulsory between the ages of 5 and 16. There are three types of schools: state, church, or independent. The state provides free education, including free textbooks and school transport in the primary and secondary schools. It also provides study grants to practically all students in postsecondary education.

31.3.1 Early Childhood Education (ISCED 0)

Kindergartens were first set up in 1975 to cater for four year olds. This educational provision was extended to three-year olds in 1987. The law requires the state to set up such centers in each town and village, most of which are attached to primary schools. Attendance is entirely voluntary. This level of education caters for children aged two years and nine months up to four years. It takes place in kindergarten centers that are attached to primary schools. Although kindergartens do not fall within compulsory education, about 98 % of the age cohort (three and four years old) attend these centers. This level of education is considered as an integral part of a child's education and is provided free in all state and church schools. Preprimary education is also provided within the independent sector, but parents opting to send their children to these schools pay tuition fees. There are several private nursery schools, some of which are operated by the religious orders, and others are operated by private individuals. The current program lays emphasis on the socialization of children and encourages opportunities for guided intellectual, emotional, creative, and physical development. At this stage, the emphasis is meant to be on play. The pupil-teacher ratio for preprimary level within the state sector stands at 1:10, whereas that of the independent sector stands at 1:20.

31.3.2 Primary Education (ISCED 1)

Primary education lasts for 6 years (from Year 1 to Year six). State primary schools generally cater for the needs of all children within each town and village. However, a number of parents opt to send their children to church and independent schools. State primary schools are all coeducational (since 1980), as are the majority of independent schools. Church primary schools, on the other hand, generally cater for

either boys or girls. Classes in primary schools normally do not exceed 30 pupils and have one main classroom teacher. The pupil-teacher ratio at this level within the state and church and independent sector currently stands at 1:19. Teachers in the areas of the creative arts (i.e., art and drama), physical education, and science visit the schools on a regular basis to provide specialized sessions. Educational psychological services are available for primary school children. An individualized complementary education program is provided for pupils experiencing difficulties in the mainstream program. Facilitators are allocated on a one-to-one basis with pupils facing specific physical or learning difficulties. This is in line with the current inclusive education policy.

State primary education is broadly divided into two cycles of three years each, with the first three years emphasizing social skills and preliteracy and pre-numeracy skills, gradually progressing to more formal skills. In this cycle of primary education, where pupils are generally under the pastoral care of a separate head of the school, all classes are of a mixed ability, and informal teacher assessment is carried out. Progression from one year to another is normally based on age. The second cycle of primary education is also of three years and lays more emphasis on academic skills. Formal end-of-year examinations take place in Years 4–6 in English, Maltese, mathematics, religion, and social studies. In Years 5–6, pupils are streamed on the basis of their performance in these examinations. At the end of primary education, selective examinations take place. The breadth of the examination is intended to ensure adequate emphasis in all areas of the primary curriculum. Success in these selective 11+ examinations in the five main areas leads to entry into single-sex junior lyceums. Over 73 % of the Year 6 population in primary schools sat the 11+ examinations in 2001. The current pass rate is around 53.8 %. Currently, about 51.8 % of male candidates and 56.1 % of female candidates qualify for entry into the selective junior lyceums. The pupils who fail this examination or do not sit for it proceed to general area secondary schools.

Church and independent primary schools have no formal division into cycles. Assessment is carried out independently by individual schools, and there is an increasing use of the varied services provided by the state. While pupils attending these schools can, in most cases, proceed automatically to their secondary sector, a common entrance examination is held at the end of primary education for pupils who have not attended a church school or else attended a church primary school that does not have a secondary sector. Currently, this opportunity is only possible for boys. In 1999, 1,410 pupils sat for this examination and 440 were admitted.

31.3.3 Secondary Education (ISCED 2)

After the six years of primary education, students proceed to five years of secondary education (Form 1 to Form 5). The state provides single-sex education, of which there are two types: Students who pass the five junior lyceum examinations are admitted into junior lyceums (grammar schools). In both types of schools, the secondary course is divided into two cycles. Junior lyceums have an introductory

two-year cycle where pupils follow a common curriculum with limited options (e.g., choice of one foreign language), which serves to orientate pupils toward later studies. A more determinative three-year cycle follows during which pupils elect to study a number of subjects alongside a compulsory core curriculum. In general, pupils are allowed to choose a range of subjects which will help them realize their vocational and higher education expectations. On the other hand, area secondary schools have an initial three-year cycle with a similar broad orientation as in junior lycées. This is followed by a two-year cycle during which students opt for a number of subjects to study alongside the compulsory core curriculum. The student-teacher ratio at the secondary level in the state and non-state sector currently stands at 1:10. The academic year 2013/2014 saw the state sector introducing the first coeducational secondary school. Recently, the Ministry for Education and Employment announced that as from the forthcoming academic year, all state secondary schools will be coeducational.

31.3.4 Inclusive Education

Children with special educational needs are educated within mainstream schools wherever possible. A state moderating panel, on the basis of assessments by specialists, recommends the kind of educational support and facilities required by the child to benefit from inclusion in mainstream education. The panel, in consultation with parents and teachers, draws up an individualized educational program (IEP) for each pupil with a disability. Inclusive education coordinators are responsible for managing inclusive education at the school level. Support may include the services of a learning support assistant (LSA) on a part-time or full-time basis. Those children with special educational needs who are not integrated into mainstream education are educated in special schools, while every attempt is made for these children to enjoy inclusive experiences. During an initial teacher training, significant emphasis is being placed on various aspects of inclusive education, while teachers in service are offered training in various aspects of inclusive and special education.

31.3.5 Upper Secondary Education (ISCED 3)

Upper secondary education provides students with the opportunity to pursue further studies in various domains leading to university entry requirements, vocational courses, or the world of work. All education at this level is provided by the state, except that a small number of church and independent schools provide university entrance courses. Postsecondary education is available to all students satisfying minimum entry requirements as requested by the different institutions. In general, pupils at this level are awarded study allowances to cover particular expenses incurred by pupils. All schools at this level are coeducational and teaching staffs are trained to at least the first-degree level.

The junior college caters for the majority of students wishing to pursue further studies at a university. The entry requirements into the junior college are six passes in the secondary education certificate examinations at Grade 5 or better which must include English, Maltese, and mathematics, one science subject, and two other subjects. Students follow a two-year program leading to the matriculation certificate. At this college, students study two subjects at an advanced level and four subjects at an intermediate level, one of which (Systems of Knowledge) is compulsory. In 2001, 65.5 % were awarded the certificate.

The Institute of Tourism Studies which currently falls under the Ministry of Education, Culture, Youth and Sports runs a variety of courses. Entry requirements vary from course to course. While the minimum entry requirements for a number of certificate courses being a "satisfactory school-leaving certificate," other courses require a City and Guilds Level 1 or Level 2 qualification, together with a number of SEC passes, whereas the advanced courses require at least two passes at an advanced level. On completion of these courses, students can join the bachelor's program at the University of Malta in B. Com. (Hons.) in Tourism.

An extended skill training scheme launched in 1980 with ILO assistance takes the more successful trade school graduates for an extended training at a level somewhat beyond craft level. However, other pupils from different institutions can be considered for entry as long as they fulfill entry requirements. Trainees are employed by government departments, parastatal corporations, and private industry and divide their time roughly equally between on-the-job training and formal studies at an appropriate institution.

31.3.6 Tertiary Education (ISCED 5 and 6)

The 1988 Act obliges the state to provide free university education to all students with the necessary entrance qualifications. Subject to fulfilling course entry requirements, any student has the right to register in a course of his or her own choice, with no barriers placed by numerus clausus or other factors. However, the university is not obliged to offer any course on a regular basis, so that some courses are available every other year (because of the restrictions imposed by available teaching facilities) to ensure adequate standards. The law gives a large degree of autonomy to the university in formulating its statutes, regulations, and byelaws; in the administration of its funds (both those which the law requires which need to be appropriated by parliament and which the university may secure from other sources) and the provision of courses, and in the appointment of staff. The registrar of examinations, an official within the Ministry of Education, is empowered by law to monitor examinations held by the university. The roots of the university go back four centuries; it was founded in the late sixteenth century. The Education Act of 1988 contained important provisions about the university. The main provision is that the university is obliged to admit all students who hold the entry requirements without recourse to any numerus clausus.

Current entry requirements are the matriculation certificate made up of passes in two subjects at the “A” level and three subjects at the intermediate level, plus Systems of Knowledge. A pass at least at the SEC level is also needed in English, Maltese, and mathematics. The university, however, is free to decide which courses to offer, and some courses, notably in the Faculty of Medicine and Dentistry, currently admit limited number of students due to constraints of space and equipment. Although the intention is to provide opportunities for as many candidates as possible who wish to further their studies or else retrain themselves, the number of available places may be limited, and thus an order of merit of applicants would have to be drawn. This would be based on passes in compulsory subjects, preferred subjects, and all other subjects at ordinary, intermediate, and advanced levels.

The Malta College of Arts, Science and Technology (MCAST) includes a number of institutes in mostly technological areas that cater for students wishing to pursue studies at the higher education level. All courses have one major common feature: a vocational orientation. This implies that these courses are designed round theory and practice which would involve course work at the various institutes and field experiences through work engagements in various government and private industries. Entry requirements into these institutes will vary. Given the college’s orientation, the teaching staff the various institutes aim to recruit may have either academic or vocational qualifications or a first degree plus work experience in the relevant area or a combination of both. While the college aims to bring together existing courses and introduce new ones, the thrust is to strengthen the postsecondary vocational education provision alongside the courses offered at the University of Malta. As the country is a member of the European Union, it is imperative that its current and future labor force has the professional and academic expertise required to take the country forward. Thus, it is envisaged that lifelong learning both as a concept and as a strategy becomes a way of life.

31.4 Developments in the Current School System

Early years’ provision has been available and accessible for decades among the state, the grant-aided church, and the independent sectors. However, the need was felt to design a national policy based on the cultural needs and the national climate and to identify shared understandings and expectations of early childhood education and care. A working group reviewed the current provision and made the necessary recommendations. It covers aspects of finance, participation and access, transition, staff qualifications, learning programs, monitoring, and evaluation as well as research. The recommendations will be implemented in phases. As from January 2007, the government introduced fiscal measures to promote early childhood care. These include tax incentives for parents sending their children to early childhood day centers. In line with the recommendation, discussions are under way with the University of Malta to start a course in early childhood education and care (ECEC) at a diploma level in October 2009 for the current and future staff. By 2010/2011, the diploma will be the entry qualification for those aspiring to teach at the

preprimary level. It is also envisaged that by 2015/2016 new recruitment of preprimary teachers will be open to those in possession of a bachelor's degree in early childhood education and care. In line with these developments, the university has started to offer a master's degree in early childhood education and care and is developing the degree course at the bachelor's level in early childhood education and care.

The government is committed to improving the achievements of children with special educational needs. A working group was set up to assess the policy, provision, and practice regarding inclusive education giving special attention to the roles and functions of the respective officials, professionals, and structures and to the current service delivery at the different levels. A policy document *Inclusive and Special Education Review* was published in June 2005, and its recommendations are being phased in. One of the first projects included the grouping of special schools within a college network under the responsibility of a college coordinator in October 2005. In July 2007, the post of learning support assistants (LSAs) was created to incorporate all the previous grades who worked with children with special needs. LSAs support and collaborate with the class teacher to ensure that the curricular entitlement of children with special needs is catered for. The current staff is being provided with professional development in-service courses.

An upward trend of students wishing to further their studies at the tertiary level can be observed. While in 1985 only 6.3 % of the 18–22 age groups were enrolled at the university, this has steadily gone up over the years. In fact in 2008, 28 % of the age group currently attends the university.

The National Commission for Higher Education (NCHE), which was set up in October 2006, falls within the government's strategic objectives of further developing higher and tertiary education and proposing a clear vision and sustainable targets and objectives for these sectors. In December 2007, NCHE finalized its recommendations regarding quality assurance for further and higher education which were published as *A Quality Assurance Framework for Further and Higher Education in Malta*. The commission is also spearheading the consultations taking place to reform higher education. The government is committed to promoting further specialization at higher levels of education particularly at master and doctorate levels. To reach this objective, a number of scholarship schemes have been launched to assist students wishing to continue their postgraduate education. The latest scheme *Strategic Educational Pathways Scholarships (STEPS)* was launched in January 2009 and is part-financed by the European Commission through the European Social Fund.

31.4.1 Examination System at the End of Primary Education

The Maltese education authorities were moving away from a highly examination-oriented system to one based on the achievement of standards set through the introduction of a benchmarking system. The 11+ examinations have been finally phased out in all schools.

31.4.2 Links Between the School and the Local Community

The concept of schools serving as community learning centers is gaining value within the local educational sphere. The national minimum curriculum promotes and lays the foundation for this initiative in relation to lifelong education and stakeholder participation in the educational process. The Foundation for Educational Services through its parent support program provides parents with skills to help their children's learning at all stages of their development. Concurrently, the foundation provides after-school programs to pupils facing learning difficulties in mainstream education. Such programs normally include parental involvement. Local councils may make use of the school spaces and facilities in the promotion of education, culture, and civic responsibilities within the community.

31.4.3 Malta Qualifications Framework

The Malta Qualifications Council (MQC) was set up in October 2005 through legal notice 347/2005 to define a national qualification framework (NQF) which will provide learners with a map of all levels of qualifications, of entry and exit points at every level of qualifications, and of levels of qualifications by sector and by occupation. The NQF is being developed in the framework of lifelong learning and will focus on learning outcomes defined in terms of knowledge, skills, and competencies. Similar to the European qualification framework, the Maltese NQF is meant to be a common reference point between training providers, industry, and learners. The first draft of the NQF was launched for consultation in November 2006. The NQF was completed and launched in June 2006. Relevant legislation will be enacted during the early part of 2009 which would include the Malta Qualifications Council as a part of the Further and Higher Education Act. Other related legislation will incorporate the recognition of qualifications within MQC as well as the validation of informal and nonformal learning. During these last three years, MQC has acted as a bridge between vocational training and industry and has published for consultation policy documents on the framework of qualifications, the quality assurance for vocational training, the validation of informal and nonformal education, and a program of studies of key competences for lifelong learning. It is now in the process of finalizing a document on the referencing process of the MQF to the EQF.

31.4.4 Council of the Teaching Profession

The Amended Education Act of 2006 envisaged the setting of a Council of the Teaching Profession. The council will regulate the practice of the teaching profession in Malta. It will be composed of both elected members and appointed members from among the teaching professionals. The first elections were held in February 2008 and the first council was established in July 2008.

31.4.5 Student Support Services

The ministry provides a number of programs and has introduced measures over a number of years to bring about social inclusion of pupils especially those at risk of dissatisfaction. It has introduced services catering for areas such as child abuse, bullying, and substance abuse. It has published various policies including a code of school behavior. Other support services include guidance and counseling services, school psychological services, school social work services, and a school medical service. A specialized program is also available for teenage mothers. The Good Shepherd program is meant to ensure that all children who have attained their fifth birthday are attending schools. These programs complement other support services already in place. The newly set-up Directorate for Educational Services is responsible for consolidating, coordinating, and upgrading the existing services and introducing new ones to assist learners in managing life situations more effectively thus benefiting fully from their education cycle. One major service which the new directorate is reforming is the guidance and counseling services. The reform is aimed at relaunching career guidance services to respond to the changing needs of students and their families and the reforms taking place at the system level. One aspect of the reform is the further decentralization of the service at the college and school level and the establishment of new posts among which are counselors and career advisors at both the college and school level. The reform also includes the professional development of personnel, including postgraduate scholarships under the Career Guidance Capacity Building Scholarship scheme which was launched in January 2009.

Another initiative is a national review of independent certification at the end of compulsory and postsecondary education. The aim of this review is to evaluate whether the current differentiated paper system is to be retained at 16+, the components of the matriculation certificate at 18+ are still valid, and whether the link between these two stages of education needs to be strengthened. The review will also study the dilemma between certification for all at the end of compulsory schooling and qualifications which necessitate the need for a standard to be reached in order for the qualification to be issued as well as the tension between academic and vocational certification.

31.5 New Developments

There is a period of major reforms cutting across the education sector – from early childhood education through to higher and tertiary levels and lifelong learning. A number of initiatives over the past five years express a move by central authorities to give more powers of responsibility and authority to the schools. All state primary and secondary schools have been developing school development plans for over 14 years. Such a move expresses the view that school improvement can be brought about by concentrating development efforts on the school, hence seeing the school as the major unit of change in the education system. This is further supported

by the current initiatives involving national curriculum reforms (Ministry of Education 2000, 2001; Giordmaina 2000).

This conceptualization provides an alternative view to the centralized, prescriptive model of school improvement that state schools have been used to. State schools in Malta have been used to working within a system which is hierarchical, centralized, and bureaucratic. As a result, teachers have grown weary through disillusionment and stress (Bezzina 1995; Borg and Falzon 1989). Teachers constantly find themselves sandwiched between a belief in democracy and participation on the one hand and the daily experiencing of a lack of structures to function as decision-makers. Over the years, schools have never been given the opportunity to develop into vital places of learning and into sites of professional inquiry and reflective practice (Bezzina 1998). Moving from the shackles of dependency to one of autonomy will not be easy. One cannot talk of such moves without really understanding the culture and climate that have evolved over the years which have led to the current situation and in actual fact determine, to a large extent, how people think and act. Present conditions and circumstances of schools could not have been planned to be more antithetical to their becoming centers of inquiry and change. Among the worst of these conditions are the isolation of educators (both teachers and school administrators) from one another, the fragmentation of the school day into separate subject matters, the apportionment of specific time per subject, the untenable ratio of students to teachers, and the lack of time for genuine reflection, sharing, and critical inquiry among teachers (Bezzina 1999). Any effort to improve the effectiveness of schools depends on an understanding of the dynamics of schools. This implies exploring the actions and influences of teachers, students, education officials, parents, community members, the curriculum, and the ways in which these influences operate. In fact, the NMC is calling for radical changes in the whole culture of philosophical and pedagogical practices toward collegiality and collaboration among all stakeholders. The major challenge is indeed one of leadership. The system needs charismatic and transformational leaders who emphasize creative, collaborative co-leadership and who appreciate the need for relationships and changing work patterns. Currently, various initiatives being undertaken at systems and school levels are aimed at developing such a culture while at the same time introducing various reforms which aim to modernize certain practices and improve the quality of education.

In understanding the early stages of the Amended Education Act of 2006 reform, it is important to point out that the existing state-maintained clusters of primary and secondary schools, which between 2005 and 2007 were known as “school networks,” are presently identified as colleges. The Maltese state schools have been clustered into ten colleges brought together on a regional basis. These are similar to educational federations in the United Kingdom. Before the 1990s, the operations of state-maintained schools in Malta were largely dependent on policies emanating from the former education division. The constitution of school networks in 2006 required a shift toward a decentralized system. As documented by Fenech (1994), the road to this new form of educational democratization finds its origin, as early as 1989, in a number of ministerial pronouncements on the introduction of the

decentralization theme in educational policy. In 1994, a Consultative Committee on Education (Wain et al. 1995), whose remit was to reexamine and revise educational policies and practices, published the report *Tomorrow's Schools: Developing Effective Learning Cultures*. This document proposed the development of schools as learning communities which were to cater for the well-being of students and which were to bring together the experience and expertise of teachers and parents for the benefit of the educational needs of the students. A significant educational landmark which followed the presentation of this report was the national minimum curriculum (NMC) document presented by the Ministry of Education in 1999. The NMC laid down the kind of educational knowledge and skills that a child needed to acquire and to grow up valuing democracy and solidarity. On a general note, the NMC gives substance to the concepts of collegiality, consultation, partnership, and collaboration among students, educators, and stakeholders within the parameters of the networking policy, as outlined in the NMC strategic plan (Ministry of Education 2001). The NMC of 1999 called for radical changes in the whole culture of philosophical and pedagogical practices.

The networking policy, which has its roots as early as 1999, was realized in 2005 when the same ministry launched the networking reform policy document *For All Children to Succeed: A New Network Organisation for Quality Education in Malta*. This revolutionary seminal document provided proposals for an overhaul of the Maltese education system that was meant to bring about a paradigm shift in local education. The whole notion was not to introduce a new model but to improve the existing one. Reorganizing and modifying the existent model required schools to work in partnership, share resources, jointly solve problems, and create new practices so that children's needs are addressed. The adjustment was to establish a strong orientation toward a collaborative mind-set that was meant to consolidate an effective collegial spirit. Collegiality would help transform the existing practice of teachers working mostly in isolation. Maltese state-maintained schools had for years worked in isolation as independent units and inculcated a culture that had led to teachers entrenching themselves and preferring to work on their own (Bezzina 2002, 2009). It is within this context that the cultural change underlining the significance of teamwork and joint working has to take place. In 2006, the proposed policies of networking that were presented in a series of proposals in FACTS (2005) and aimed at bringing fundamental changes in the way school and college practitioners synergize, relate, and collaborate were endorsed in the Education (Amendment) Act of 2006. Both official documents could be regarded as the precursors of reforms that were set in motion in 2006 and which are still ongoing. The reform advocated a change in educational governance, from a top-down bureaucracy to communities where parents and practitioners who work within them come together for the benefit of the learning child. It suggested systemic transformation, which entailed a paradigm shift in the mind-set and culture and became a working reality by the endorsed policies in the Education Act of 2006 that had been originally introduced in the seminal reform document FACTS (2005).

Educational Maltese policy makers saw the growing move toward the establishment of networks, clusters, or federations abroad as the way forward to enhance the

quality of education while at the same time acknowledging that there is no blueprint for an effective network (Bezzina 2005). They recognized that the organization of networks in education is an almost worldwide phenomenon. “There are now many schools, both in the U.K. and internationally, that benefit from working together as a network” (Ministry of Education 2005, p. 38). Networking was going to be a ground-breaking experience for Maltese state schools, and consequently, any form of change would not be easy. Convincing Maltese professional educators with years of experience, who felt and thought that they had been working within a conservative yet successful education system, to endorse the reform and adopt the proposed change as the way forward could be problematic. In effect, the transformation of the Maltese education system into a new framework provoked a vigorous and ongoing debate among a diverse mix of participants, the Ministry of Education, university academics, the Malta Union of Teachers, and stakeholders like teachers, heads of school, and school network coordinators.

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Reinhard Hanneschläger

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32.1 History and Social Parameters of the Education System

When political independence was proclaimed in 1991, the Republic of Moldova was faced with the task of establishing its own education system. Never before was there an independent national state within these borders: education was always part of something much larger, whether that be Russian, Romanian, or Soviet. As part of the USSR, the Moldovan Soviet Republic had a very well-developed education system that boasted a high level of academic achievement and lively exchange with other facilities across the whole Union.

R. Hanneschläger (✉)
University of Applied Sciences, Wildau, Germany

Republic of Moldova

										Grade	Age
										17	23
										16	22
										15	21
										14	20
										13	19
										12	18
										11	17
										10	16
										9	15
										8	14
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										6	12
										5	11
										4	10
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										2	8
										1	7
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											4
											3

Russian, a language which many Moldovans are still ambivalent about today, was essential for inclusion in the Soviet university system. The imposition of the Cyrillic script alienated the Romanian language spoken by the majority of the population. Described now as Moldovan, this became the language of lessons in National Schools. In all other schools (schools without any specific ethnic or language label), Russian was the language used.

Russian dominated at the level of secondary education; it was even stronger at university level. Although this did open up educational opportunity for Romanian-speaking population in other parts of the Union, it was an imposed assimilation that also gave rise to the desire for revenge.

When independence was proclaimed, Romanian-speaking Moldovans were highly represented among academics in the fields of education, culture, and medicine (professions required in rural areas) and somewhat underrepresented among technicians and natural scientists – here, most graduates came from more urban Russian-speaking sectors of the population. This distribution was also evident in nonacademic professions. Many technical concepts that appeared in the course of the twentieth century were introduced in their Russian form and are still used as such today. In school, this raises the question of whether the word established in everyday Moldovan Romanian should be used or whether the subsequent Romanian translation should be instead. Within a framework of a truly national education system and economy, there has been a greater effort to use more ethnic Romanian in the disciplines of economics and technology. True change however can only be expected in the long term.

The first government of the new sovereign Moldova intended to compensate the demise of the Soviet education system, or rather those elements that could be offered from the exchange with Russia, by greater cooperation with Romania. However, since 2001 when the Communists regained power, the relationship with Romania became tense, and collaboration in education is highly constrained. The revived Communist Party has marked a fundamental break in the development of the education system. Many reforms have been aborted or reversed, and particular focus has been placed on having Moldovan and not Romanian as the language of instruction, although the school subject itself continued to be called Romanian language and literature.

32.1.1 Education Reforms Since 1991

In the first 3 years of independence, the Ministry of Education introduced innovations with the help of a number of decrees. In 1994, the parliament passed Concept for Education in Moldova, and in 1995 the Law on Education was passed.

One of the cornerstones of the law was the de-politicization of lessons, i.e., laying down in law the new practice of removing Soviet propaganda and military exercises from the school system.

A further reform step foresaw the restructuring of school levels, with the lower level of secondary education being extended by 1–9 years. For the upper level of secondary education, a new type of school – the *liceu* (Years 10–12) – was introduced, replacing the *Scoala de Cultura Generala* (general education schools or upper schools) by 2005. This type of school previously comprised Years 9–11 and was shortened by 1 year at the bottom end with the restructuring of the lower level of secondary education. Upgrading an upper school to a lyceum was subject to stringent criteria, and by 2000, around 200 lyceums had been established. Thereafter, the

criteria were eased significantly, and the number of lyceums continued to grow without these schools having carried out the necessary reforms. The introduction of the lyceums in the 1990s was based on the goal of accommodating pupils in bigger and better schools within the next 10 years. Considerable emigration and the strong decline in the birth rate in the 1990s led to ever decreasing numbers of pupils. However, school closures met with public resistance, and the post-2001 Communist government suspended the implementation of the reforms. Only when the Communist government was defeated and replaced by a center-right coalition in 2009 were the plans reignited and brought to an end. In 2012, the last upper schools were transferred to other school types: smaller schools were turned into grammar schools, or gymnasiums, larger schools were expanded to become lyceums.

Between 1997 and 2004, the World Bank supported a project to reform general education schools for Years 1–9; parallel to this, the Soros Foundation financed a project to improve the quality of lessons at lyceums.

The four components of the project included curricular development, the financing and development of new textbooks, examinations, and reforming in-service training for teachers.

The new framework curriculum replaced the content-based curriculum that had predominated until then, and training and development activities ensured that changes were actually carried out. New textbooks were written, and a scheme for renting them was elaborated. In this way, the costs of developing new textbooks were spread over several years and funds provided for compiling and printing new books.

Although the curriculum enjoyed the praise of international experts, the change-over from a content-based to a goal-based curriculum was not always successful. There were many reasons for this: the curriculum proved to be very academic with an overloaded syllabus while teachers selected for the working groups were chosen on grounds of subject specialism rather than educational criteria. Training activities followed a four-level multiplier system, the multipliers at the top had the shortest period of training; these were very often not school teachers, but university lecturers with little relation to the practical realities of the classroom. On the other hand, many teachers are not able or not willing to invest time in lesson planning. This becomes understandable when one considers that for a large proportion of teachers, increasing their teaching duties – up to a doubling of hours taught – can only bring an increase on their meager basic monthly salary of 50–70 Euros. The bulk of teachers do not see fine lesson planning as part of their responsibility, instead they tend to look for precise guidelines in documents and/or textbooks.

The project fell short of its goal of restructuring in-service training. At present there is neither adequate in-service training from the state institute for education in the capital Chisinau, nor transparent rules for certifying non-state-run providers or courses. The most active organization is the Pro Didactica Center which was recognized as a training institute by the competent authorities despite initial resistance.

From 2006 to 2010, another World Bank project targeted education provision in rural areas. This included: (1) improved learning and teaching in rural schools,

(2) improved access and equality of opportunity in rural schools, (3) improved efficiency in the deployment of resources, and (4) improved education planning and monitoring.

Following on from the first project, work was undertaken to condense and simplify curricula and to adapt them better to school practice.

32.1.2 Schools in Separatist Transnistria

In many respects, part of the Republic of Moldova on the left bank of the River Dniester has been functioning as an independent state since the armed conflict in 1992. Schools are largely under the administration of local authorities with lessons taking place in both Russian and Moldovan, i.e., Romanian written in Cyrillic script as it was during the Soviet period. Schools use curricula, methods, and materials from Soviet times partly revised from the Russian Federation.

Schooling is compulsory for 9 years. After Year 11, pupils are awarded a diploma equivalent to the upper school certificate in Chisinau. There is no Year 12 in general education schools. Pupils can attend college either from Year 10 to 13 or after Year 11 of general education schools for 2 years, following a purely vocational curriculum.

Seven schools in the territory of Transnistria are accountable to the Ministry of Education in Chisinau. These all use Romanian in Latin script. For years, the Transnistrian authorities persisted in making life difficult and disrupting activities in these schools.

Despite the conflict between the two parts of the country and the bureaucratic obstacles, numerous students from Transnistria go to university in Chisinau. There are no striking differences in the level of achievement between school leavers from Transnistria and from other parts of the country; however, there are no precise statistics on this issue. School and university certificates from Transnistria have to be accredited by the Ministry of Education in Chisinau to be recognized internationally.

32.2 Fundamentals, Organization, and Governance of the Education System

Public administration reforms begun in the 1990s focusing on decentralization, and building up regional competencies were reversed by the Communist government. The government broke up the previously created administrative authorities named *judet*. Since then, as in Soviet times, education is administered via district offices above the 32 *raions*. In each district, or *raion*, there is a *Directia Raionala de Invatamant* (district education office), which the Ministry uses to administer general education schools. These district education offices are populated by a director, vice director, specialist inspectors, and methodologists.

Schools are not funded by these education offices, but from the respective community budget. In theory, the education budget is allocated by the Ministry of Finance to district authorities and from district authorities to local communities based on pupil numbers. In practice, however, communities with the “right” political undertones are given preferential treatment. Within the scope of an ongoing World Bank project, a more transparent method of funding has been elaborated. However, the draft version of the plan has been rebuffed by the government.

Vocational schools are administered by the vocational education department in the Ministry of Education and funded directly by the Ministry of Finance.

32.3 Overview of the Structure of the Education System

The designation for Moldovan schools as institutions is derived from the highest level of education offered in these schools: primary schools comprise Years 1–4, a lyceum covers Years 1–12 thus covering the primary and gymnasium schools that feed the actual lyceum.

32.3.1 General School Education

32.3.1.1 Preschool Sector (ISCED 0)

Moldova has a compulsory preschool. Roughly 70 % of children attend either a nursery school or a normal school as part of their preschool education. If so desired, this preparatory form of education can be carried out by parents; therefore, it is not possible to say with any degree of certainty how many children actually take part in some form of preschool education.

32.3.1.2 Primary Sector (ISCED 1)

The *Scoala Primara* comprises Years 1–4. A large proportion of primary schools are integrated into secondary schools. Most lessons are given by a class tutor; only occasionally does an additional teacher take over for lessons such as foreign languages and sport. Year 1 has 20 lessons per week, rising to 24 lessons per week in Year 4. Classes in conurbations usually consist of 25–30 children but can be much smaller in more rural communities. In the past, there were even classes with just three pupils.

The new curriculum for primary school was introduced as part of the first World Bank project in 1999 and comprises Romanian language and literature, foreign languages, mathematics, nature studies, Romanian history, music, art, handicrafts, and sports.

While information from the Ministry of Education suggests that less than 100 children across the whole country failed to attend compulsory primary schooling, other statistics paint a different picture, implying that only 88 % of children in an age cohort attend primary school. This discrepancy might be attributed to a large

extent to the fact that many parents emigrate with their children, making it difficult to capture this very dynamic migration of the Moldovan population in statistics.

At the end of Year 4, all children take a test. This does not assess individual school achievement, but is solely intended to provide decision-makers with information on the level of education of primary school leavers.

Primary school teachers are trained either at education colleges or education universities.

32.3.1.3 Lower Secondary Education (ISCED 2A)

In Years 5–9, the *gimnaziu* takes the children to the end of compulsory schooling. This type of school is common in many small rural communities. The new curricula were introduced incrementally from 2000 to 2001 starting with Year 5. However, the appropriate textbooks were not always readily available. Resources are tight in many schools, especially those in rural regions. Year 9 ends with an internal examination – passing this enables pupils to continue their education at another school.

Special schools are virtually all residential. Lessons in the 19 *Scoala Internat* schools do not differ from those in the regular school system; pupils are either orphans or cannot live with their parents for a variety of reasons. The most common type of special school is the *Scoala Auxiliara*, for children deemed mentally impaired. The *Scoala Speciala* specializes in children with physical disabilities and also includes schools for the blind and the deaf.

The curriculum in special schools is largely a watered-down version of targets set for the primary school, spread over 8 years, and including additional practical vocational skills. However, this is not sufficient to meet the demands of modern special education, let alone practical lessons in schools.

The curricula of the special schools are trimmed to the special needs of the relevant disability, and compulsory schooling is extended to 10 or 11 years. The decision to educate a child in the special school system is taken by the Moldovan Medical Psycho-Education Council on the basis of an examination. Theoretically, parents have the right to decide between special school and integration class, but given the shortage of integration options, this is not a realistic choice.

32.3.1.4 Upper Secondary School (ISCED 3)

The *liceu* or lyceum was introduced as a new type of school in 1995 and with it also Year 12. This replaced the *Scoala de Cultura Generala* school from the Soviet school system which was a year shorter. In the Moldovan school system, the lyceum is the standard path to gain access to a university. It has the highest reputation and is accordingly popular. Many of these schools can carry out additional investments with funds provided by parent associations to improve the meager salaries of teachers. Access is regulated by means of an entrance examination.

The school leaving certificate – the *Bacalaureat* – was introduced in 1995 and entitles a pupil to attend university. Final examinations for the *Bacalaureat* are prepared and assessed centrally. However, standards had to be hugely adjusted

downward after centralized examinations were introduced, as otherwise a large proportion of school leavers would have failed.

At lyceums, the examination is part of the school leaving program; in colleges it can be taken voluntarily after Year 12. Upper school (until 2012) or vocational school graduates can take the examination after attending an additional year either at a lyceum or at a university.

32.3.2 Vocational Schools

Vocational schools at the upper level of secondary education include the *Scoala de Meserii*, or industrial school; the *Scoala Profesionala*, the vocational school; or the *Colegiu*, or college, which although declared as ISCED 5 provides both upper level of secondary education as well as postsecondary vocational education.

The industrial school is restricted to a purely vocational curriculum for Year 10. It trains workers for the simplest tasks: but there can be no question of real learning for a trade or profession taking place.

Vocational schools span Years 10–12 and cover the curriculum of Years 10 and 11 of the lyceum as well as training in a specialist trade. The final examination comprises papers in general education and professional subjects as well as a “journeyman’s piece.” Graduating from a vocational school entitles young people to attend Year 12 at a lyceum.

By law, the college is defined as a postsecondary school for lyceum graduates. However, from Year 10–12 it provides a program containing the lyceum curriculum extended to include vocational content. At the end of college, pupils can voluntarily choose to take their *Bacalaureat* examinations. Thereafter, they can either attend university or stay another year at college. The curriculum for Year 13 at college is restricted to vocational subjects and ends in a professional qualification. Given its history, the college is a special institution in the Moldovan education system. This goes back to the Soviet *Technikum* which offered a 4- or 5-year training program from Year 9. Over the years attempts have been made to upgrade this type of school and firmly establish it as a postsecondary program. To date, however, it is difficult for colleges to attract lyceum graduates. The majority of pupils attend college after the gymnasium as an alternative to the lyceum.

32.3.3 Higher Education Sector

32.3.3.1 Universities of Applied Sciences and Universities (ISCED 5 and 6)

Besides state universities, there is a range of private universities of applied sciences and universities in Moldova. Qualifications include the *Lizentiat*, masters’ and doctorate degrees. The *Lizentiat* usually also qualifies students to teach at secondary schools for the respective subject. A university qualification is often a prerequisite for many professions that are usually accessible in other European countries upon

completion of vocational school. This represents a minor stumbling block for the development of Moldova's SME sector.

32.3.4 Educational Opportunity for Minorities and Integration

About 25 % of all children attend a minority school. The education service for language minorities and their integration in Moldova are relatively well developed. Most children can attend primary school in their mother tongue. While most minority schools are Russian, there are also Ukrainian, Bulgarian, and Gagauz schools. In schools with a strong ethnic mix, especially in the autonomous region of Gagauz, children have some lessons in their mother tongue with regular lessons being conducted in Russian. Although officially, education services at secondary level are offered in all languages, at all non-Romanian-speaking schools, lessons are actually taught in Russian. At vocational schools, such as colleges, and at universities, classes are offered in Russian provided there are sufficient numbers.

32.4 Developments in the Current School System

32.4.1 General School Education

Within the scope of the ongoing World Bank project, the Republic of Moldova is attempting to improve schooling in rural areas, with particular weight placed on improving the quality of, and access to, education. There is a wide gap between the achievement of the best pupils and the average. The performance of the Moldovan team at the International Mathematical Olympiad shows that they can more than hold their own against their peers from richer, larger countries. In contrast, however, the achievement of the mass of pupils in 1999 was significantly below the average results for OECD countries and in other transformation countries. Since then, Moldova has improved slightly and is beginning to approach the international average. However, the situation in rural areas can hardly be described as satisfactory: many pupils are feeling the effects of the poor equipment, the shortage of teaching materials, and the poorly qualified teaching staff.

32.4.2 Special Needs Schools

Recent studies have criticized the fact that a large proportion of children in special schools are there not because of any mental incapacity but attend special schools for social reasons. And in residential schools with normal lessons that are actually intended for orphans, more than half of the children come from difficult family situations: pupils live in residential schools for purely social reasons. For some years now, with the support of UNICEF, attempts have been made to establish a

system of child care that offers other opportunities besides being committed to an institution and provides more support at the level of the family and the community.

32.4.3 Vocational Education

The vocational school system in Moldova reflects an economic system that no longer exists – a system with large-scale structures and a strong division of labor with clear demarcation between administrative, technical, and operational staff. When compiling its professional profiles, the Ministry of Education still uses the Soviet nomenclature of vocational qualifications. Each year, the Ministry of Education draws up a proposal for enrolments in the various professions that has to be approved by the Ministry of Economic Affairs. Since the breakup of the USSR, the number of pupils seeking vocational qualifications at such schools has dwindled. When Soviet businesses collapsed, vocational schools lost the one contact that had not only been responsible for formulating training requirements but had also actually employed the graduates. Despite international support and numerous reforms, the country has not yet managed to adapt the vocational school system to the needs of the market economy. The vocational sector remains a kind of second-class school system, a bucket for pupils who do not have the academic diligence or talent to go to general education schools or universities. At the same time, vocational schools are seen as a means of integrating special school leavers and orphans. This “social function” overlaps the significance of this type of school for the economy. Public discussion often reduces the problems of the sector to the antiquated infrastructure of vocational schools. This obsolescence is obvious and oppressive, but to the same extent it affects the curricula, the schools’ self-image, the system of classifying vocational qualifications, and the relationship between vocational education and business.

32.4.4 Universities

For some years, Moldova has recognized Bologna objectives and has introduced measures to achieve them. However, as before, the conditions for unhindered academic exchange do not exist. The problem is not least due to the implicit assumption of many Moldovans that exchange represents a one-way street from Moldova to the EU and is largely failing because of restrictive visa regulations. Foreign students see themselves confronted with many obstacles before they can study at Moldovan universities. As interesting as a year of academic study or research in Moldova can be, academic progress is hardly possible given the framework conditions surrounding the organization of a student’s studies. Moreover, higher education is struggling with huge problems of quality. As in other parts of the USSR, universities were elitist and access very restricted. Good pupils became good students and then good graduates; graduation was recognized in monetary terms on the labor market. The subsequent high reputation of university

education has been largely retained, and access to university courses has become much easier following independence as a result of the establishment of numerous private universities and the introduction of tuition fees at state universities. In recent years, however, the number of private universities has reduced in line with stricter legal provisions, while the number of paying students at state universities has risen sharply. Given the inadequate public funding, universities have become reliant on student fees and have little interest in seeing students fail and changing to another university. As a result, students often graduate despite their low levels of ability. As the same time, curricula, teaching methods, and large parts of building and equipment are antiquated. Although a degree carries much more value on the labor market than a certificate from a vocational school, in many cases degrees are not at all relevant to the specialism required at work. Most students do not find work in their area of specialism.

32.5 New Developments

By converting the last remaining upper schools to lyceums or gymnasiums and closing a series of small schools, the Republic of Moldova has completed an important stage of reforms. The restructuring of the old 11-year school system that began in 1995 into a new 12-year system has been completed, and resources at remaining schools can be deployed in a much more efficient manner.

The funding of schools continues to be a sensitive aspect of reform. At the moment, decision-makers are striving to turn general education schools into independent legal persons responsible for their own budgets as was the case in the past in the vocational sector. To date, however, only about 30 % of schools have been converted to this new system.

An important factor in this refers to funds provided in support by the parent-teacher associations. Some calculations suggest that these associations made up 50 % of the education budget. Of course, urban schools stand to gain more from this than schools in rural regions.

Despite yearlong efforts by the Ministry of Education and international donors, there are still a series of structural problems in the vocational sector: shortages of equipment, aging teachers and obsolete content, and methodology. For some time now discussions have centered on the introduction of a new type of school – the *Liceul Profesional*, or vocational lyceum – a 4-year education from Years 10–13 that contains both a vocational qualification and the *Bacalaureat*. An experiment was concluded at two sites in summer 2013 without a decision being taken at this time on whether this type of school would actually be accepted in the new law on education.

As before, politically, economically, and socially Moldova finds itself in a precarious situation. The country cannot be expected to get its education problems under control: these problems are not just simply caused by the poverty in the country. Corruption and mismanagement need to be overcome to achieve sustainable improvement.

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Wendelin Sroka

With an area of just 1.95 km², the Principality of Monaco (French, *Principauté de Monaco*; Monegasque, *Principatu de Múnegu*) is the second smallest country in the world. French is the official language and the medium of instruction at school. The constitution declares Roman Catholicism to be the state religion. The Education Act, passed in 2007 (*Loi no 1.334 sur l'éducation*), is the legal basis of schooling in the principality. It stipulates compulsory schooling for all children and young people between the age of 6 and 16. The education system is governed by the Department of National Education, Youth and Sports (*Direction de l'Éducation Nationale, de la Jeunesse et des Sports*), part of the Home Ministry.

Children of compulsory school age of Monegasque nationality and children with a residence permit in the principality are entitled to receive education in the public school system free of charge. The public school system comprises six infant and primary schools (*écoles maternelles et élémentaires*), a lower secondary school (*collège*), and two upper secondary schools (*lycées*). In addition to the public system, there are two types of private establishments: private, publicly funded Catholic schools working under state contract and private, independent providers, among them the International School of Monaco. Today, approximately 6,000 students are taught in Monegasque schools, 75 % of them in schools of the public system and 20 % in schools under contract.

The education system in the principality is basically organized in correspondence with the French system, and the schools are equivalent to French institutions situated abroad. The *école maternelle et élémentaire* provides both preschool education (for 3 to 5 year olds) and primary education, which comprises 5 years. At secondary level, schooling is divided between lower secondary education (4 years) at the *collège* and upper secondary education at the *lycée*. The two public

W. Sroka (✉)

Deutsches Zentrum für Luft- und Raumfahrt, Bonn, Germany

lycées – *Lycée Albert 1^{er}* and *Lycée Technique de Monte-Carlo* – as well as the *lycée* of the Catholic school center *François d'Assise Nicolas Barré* offer study programs with general and vocational profiles. Most programs prepare the pupils for the corresponding *baccalauréat* (*baccalauréat général*, *baccalauréat technologique*, and *baccalauréat professionnel*). Teaching and examinations at this level are supervised by the Academy of Nice (France). While the programs leading to the *baccalauréat général* and to the *baccalauréat technologique* last for 3 years, the *lycées* also offer vocational education programs lasting 2 years. These programs prepare for qualifications in service and industry sectors, documented by the *Certificat d'Aptitude professionnelle (CAP)* or the *Brevet d'Etudes professionnelles (BEP)*. Successful students may choose to continue their education at the *lycée* for two more years for the *baccalauréat professionnel*.

Monegasque schooling has a number of specific features. By tradition, Catholic religious education is provided in public schools and included in the curriculum unless explicitly refused by parents. Also, schools promote learning of the Monegasque language, and history and civics classes pay special attention to studies on Monegasque issues. French is taught as a second language in a number of schools to support the integration of students from non-French-speaking families. The peculiarities of pupils' future careers in a country the size of Monaco have made it necessary to develop a specialized system of educational and career counseling. Therefore, counseling services for pupils are provided by career officers employed in all secondary schools and, at national level, by the *Centre d'Information de l'Education Nationale (CIEN)*. Lastly, measures to promote foreign-language learning, especially English, from preschool age and the organization of "European classes" reflect both the international composition of the school population and the intention of the authorities to implement intercultural education and prepare the pupils to live and work in an international environment.

With few exceptions in the areas of vocational training in technical, business, hotel management, and secretarial work, pupils graduating from Monegasque *lycées* may take up higher education programs in France. To cover part of the costs incurred by students pursuing an education abroad, the government has developed a special scholarship scheme. Furthermore, there are five providers of postsecondary education in Monaco: the *Lycée Albert 1^{er}* with training programs for the service industry; the *Lycée Technique et Hôtelier de Monte-Carlo*, specialized in programs for the hotel industry; the nursing school (*Institut de Formation en Soins Infirmiers*) at the Princess Grace Hospital Centre; the Municipal School of Plastic Arts (*École Supérieure d'Arts Plastiques*); and, finally, the International University of Monaco (IUM). The IUM, a private institution of higher education, founded in 1986 and accredited by the US-based Accrediting Council for Independent Colleges and Schools, offers English-language undergraduate and postgraduate programs in business administration, e-commerce, and financial engineering.

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Saša Gavrić

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S. Gavrić (✉)
Sarajevo Open Centre, Sarajevo, Bosnia and Herzegovina

34.1 History and Social Parameters of the Education System

Montenegro is one of Europe's smallest states, covering an area of about 14,000 km² and with a population of only 625,000 inhabitants (2011 census). Montenegro was one of the six republics of the former Yugoslavia and from 1992, together with Serbia, constituted the successor state of the Federal Republic of Yugoslavia. In 2003, this was transformed into the confederation of Serbia and Montenegro, primarily as a result of the pressure from the European Union. However, the disintegration of the confederation was virtually inevitable. In a referendum in 2005, the people of Montenegro voted for independence, albeit by only a small majority. This brought about the dissolution of the last federal state of Yugoslavia, and in its stead emerged the Republic of Montenegro. Montenegro has a candidate status for European Union membership and in 2013 was declared the leading state in the integration of the West Balkans into the EU.

34.1.1 Cornerstones of Historical Development and Phases of Reform and Innovation

The first Montenegrin schools go back to the Middle Ages (as of the twelfth century) and were established in orthodox and Benedictine monasteries, which were the centers of spirituality. The grammar school in Kotor was founded in the thirteenth or fourteenth century. In 1492, the first state printing house (*Crnojevića štamparija*) was founded in Cetinje, the former capital, where the first books, including those for the churches and monastic schools, were printed. When the Turks invaded Montenegro at the end of the fifteenth century, there began a 200-year political and intellectual stagnation of the country. Only in the coastal regions, under Venetian and later under Austro-Hungarian control, did development continue without interruption. The beginning of the nineteenth century was of great significance to the Montenegrin education system. Relations with Russia and Italy were very close, and intensive work was carried out on cultural enlightenment under the ruler and bishop Petar II Petrović Njegoš. Between 1833 and 1834, the first state school was founded, and the printing house in Cetinje was modernized. In 1879, the first Education Act (*Školski zakonik*) was passed, as a result of which the Ministry of Education (*Ministarstvo prosvjete*) and the 3-year compulsory primary school were introduced. In 1869, the orthodox-theological secondary school (*Bogoslovija*) was established with the help of Russia in order to train teachers and orthodox priests. In the same year, the first school for girls, the girls' institution (*Djevojački institut*), was established, and in 1880, the Royal College of Science (*Knjaževska realna gimnazija*) was added. Even though further schools were founded up to World War I, 97 % of the population could not read or write at the beginning of the twentieth century. When the Kingdom of Serbia, Croatia, and Slovenia was founded in 1918, Montenegro's development in the state of Yugoslavia began. In quantitative terms, however, the greatest progress in the development of the education system was made after World War II. In this period,

successful steps were taken to combat illiteracy in the form of the so-called writing courses, the 7-year compulsory primary education was introduced (1947), and numerous institutions and faculties of higher education as well as vocational and technical school were founded in order to accelerate industrialization. In the 1950s, the 8-year compulsory primary education (*osnovna škola*) was introduced by legislation. A large number of workers' schools and adult education centers were opened in order to intensify adult education. Between 1976 and 1990, the education system was organized in line with the principle of the so-called self-management. Secondary education was restructured and "oriented secondary education" was introduced. Accordingly, the 4-year grammar school was discarded and converted to a secondary school with an academic phase lasting 2 years and a work-oriented phase lasting 1 or 2 years.

The reform did not meet expectations however, and the education system was further changed early in the 1990s with the introduction of democracy and the collapse of the former Yugoslavia. This included dispensing with the "oriented" secondary education and reviving the grammar school. In the 1990s, during the armed conflict in the former Yugoslavia, the education system became isolated as dependence on Belgrade grew. Not until the democratic transition in 2000 did a real opening up occur, leading to an increase in international cooperation, which in turn initiated a reform in the school system and enabled the Montenegrin education system to become completely autonomous.

34.1.2 Parameters for Developing the Education System

The political situation in the Balkans in the 1990s was marked by permanent instability and ethnic conflicts that led to the economic, political, cultural, and social isolation of Montenegro. During the state union with Serbia, Montenegro, which is fairly small in comparison with Serbia, was politically dependent on Belgrade, a situation which could only be changed with the introduction of democracy and the collapse of the Milošević regime in 2000. The real independent development of Montenegro did not begin until 2005 when it proclaimed independence.

Montenegro's population, up to 63 % (in 2011) of whom lives in urban areas (one-third alone in the capital), is made up of many different nationalities and ethnic groups. According to the last census in 2011, Montenegrins account for 44.98 % of the population, Serbs for 28.73 %, Bosniaks for 8.65 %, Albanians for 4.91 %, Muslims for 3.31 %, Roma for 1.01 %, and Croatians for 0.97 % (Monstat 2011, p. 8). However, the majority of the population (with the exception of the Albanians and the Roma) shares a common native language, which has different names: Montenegrin, Serbian, Croatian, and Bosnian. In contrast to Croatia, Bosnia and Herzegovina, Serbia, and Kosovo, there were no major ethnic or religious conflicts in Montenegro. This democratic coexistence could possibly serve as a model for the other Balkan states. Nevertheless, Montenegro's society is much divided. The question whether Montenegrins are actually a race of their own or

simply members of the Serbian people (both are Orthodox Christians) is hotly disputed, even by the Montenegrins themselves. In particular, conservative Serbs consider a large section of the Montenegrin population to be members of the Serbian people. This is also reflected in politics, in particular in the struggle between the opposition and the government. The last presidential elections in 2013 and the long drawn-out discussion about what to call the native language lessons in school (Montenegrin or Serbian) are just two examples of the conflict. On top of this, the largest minority made up of Bosniaks and Muslims primarily living in the north of the country has different opinions on what their ethnicity should be called although there is only one group with a Slavic ancestry and Muslim faith.

34.2 Fundamentals, Organization, and Governance of the Education System

34.2.1 General Principles, Current Educational Policy, and Goals of the Education System

Since the end of the 1990s, the Montenegrin education system has been undergoing a process of modernization, which has to meet three requirements simultaneously:

- Converting the centralized system used by the former Yugoslavia into a democratic, decentralized education system
- Rebuilding Montenegro, in particular the infrastructure, following the armed conflict and isolation in the 1990.
- Adapting Montenegro to the demands of the global and technological progress

In 2000, the government initiated a reform of the education system, the content of which was published in *The Book of Changes of the Education System of the Republic of Montenegro (Knjiga promjena obrazovnog sistema Republike Crne Gore)* (Ministry 2001) following public and political discussions lasting several months. The study also contained an overview of the objectives, the opportunities, and the organizational and financial proposals included in the reform of the education system.

The main objective of the education reform is to develop a school system that is compatible with the demands of a democratic and open society based on a constitutional state, which is characterized by multicultural coexistence, mutual understanding, and tolerance (Ministry 2001, p. 9).

Slovenia's school and education system served as a model when the reform of the education system was being planned since the ex-Yugoslavian state was basically in the same situation as Montenegro in 1991 following its independence and had succeeded in reforming its education system. The analysis of the English, Hungarian, French, Danish, Austrian, Russian, Scottish, and Finnish education systems also proved to be of great assistance (Zavod za školstvo 2006c, p. 12).

The main principles on which the education reform is based include:

- Decentralizing the school system (the municipality, the school, and the social partners should be involved more in the decision-making process)
- Equal opportunities for all
- Individual selection wherever possible
- Introduction of European standards
- Introduction of a quality system
- Development of human resources
- Lifelong learning
- Flexibility
- Horizontal and vertical connections and removal of barriers
- Harmonization of school programs and requirements
- Interculturism
- Gradual implementation of reform (Ministry 2001, pp. 14–29)

In other words, the Montenegrin schools should offer the following: knowledge and skills based on progress made in the areas of science, technology, culture, and art should be supported; an internationally comparable level of knowledge should be acquired; a critical way of thinking and communication skills should be developed in order to resolve conflicts peacefully; moreover, an awareness of responsibility toward one's living and work environment and one's own health should be nurtured together with the ability to live in pluralistic and democratic societies; and understanding, tolerance, and solidarity should be promoted.

34.2.2 Basic Legal Principles of the Education System

One of the main goals of the school reform was to establish new basic legal principles for the education system to make a fundamental decentralization possible. For this reason, the Montenegrin parliament has passed the following acts (with subsequent amendments) since 2000:

- General legislation on education
- Legislation on preschool education
- Legislation on primary education
- Legislation on secondary education
- Legislation on vocational training
- Legislation on adult education
- Legislation on education for children with special needs
- Legislation on higher education
- Legislation on science and research

This legislation creates a basis for modernizing the higher education system. According to the General Education Act, the Ministry of Education has to approve the programs (curricula) for preprimary, primary, and secondary education as well as for adult education. They are devised by the relevant advisory board: academic

education, primary education, specialist education, or adult education. The education authority and the Center for Specialist Training are responsible for all issues concerning the setting and conducting of examinations (see below).

34.2.3 Governance in the Education System

The Ministry of Education (*Ministarstvo prosvjete Republike Crne Gore*), or its subordinate units, is responsible for all educational issues. The important subordinate authorities are:

- The General Education Board (*Savjet za opšte obrazovanje*)
- The Specialist Training Board (*Savjet za stručno obrazovanje*)
- The Adult Education Board (*Savjet za obrazovanje odraslih*)

The three advisory boards are all made up of teachers in the area of general, adult, or specialist education and representatives of the education authority (see below), of science, and of the ministry, and each has 15 members appointed for 6 years. Their responsibilities include determining the syllabuses in the preschool, primary, secondary, and adult education, the work programs of the specialist teachers, and the method of teaching. They decide on the course plans and programs and the in-service training programs for the headteachers and teachers. They make proposals on the further development of the education system, school system, etc. The advisory boards' work is performed in commissions. In addition, there are other state educational institutions.

The education authority (*Zavod za školstvo*) defines and improves the quality of the education system and is the central institution in Montenegro's modern education system. It is responsible for development, consultation, research, and specialist tasks in all areas of academic education. Furthermore, it organizes external examinations in the primary schools and grammar schools and in-service training courses for the teaching staff and prepares course plans, teaching standards, and methodology. In contrast to the three advisory boards, the education authority is responsible for implementing the curricula. The education authority is responsible for preschool, primary, and secondary education as well as adult education and the education of children with special needs.

The Center for Specialist Training (*Centar za stručno obrazovanje*) has the same responsibilities as the education authority, but only in the areas of specialist training and adult education.

The school board (*Školski odbor*) is the highest internal administrative body. The school board has five members (three appointed by the ministry, one by the parents, and one by the teachers in the parent-teacher association). The board members are appointed for a period of 4 years. A school's administrative board decides on development programs, annual work plans, extracurricular activities, annual budgets, the internal organization of a school, and any other activities allocated to them. In addition to the school board, there is a headteacher (*direktor*), who is at the same time the director of studies. The headteacher is appointed by the school's maintaining body (usually the Ministry of Education or the municipality) for a

period of 4 years following a public tender. The appointment has to be confirmed by the education minister. In addition to passing the state examination in the relevant field (*stručni ispit*), the candidate must have worked for at least 5 years in a school. The appointment is followed by further training carried out by the education authority. The headteacher is responsible for planning, organizing, and running a school and conducting educational programs as well as heading the board of teachers (*nastavničko vijeće*) and the advisory board (*stručno vijeće*). Furthermore, the headteacher selects the teachers and members of the staff, organizes their in-service training, and liaises between teachers, pupils, and parents.

In addition to the school board and the headteacher, there are other key bodies: the board of teachers (*nastavničko vijeće*), the class council (*odjeljensko vijeće*), and the organization of the teachers of special subjects (*stručni aktiv nastavnika*). Parents can be organized in the parent-teacher association (*savjet roditelja*) and pupils in the school council (*zajednica učenika*).

34.2.4 Funding

In the Republic of Montenegro, education in state primary and secondary schools is free of charge. State schools and other educational facilities are mostly financed by the Treasury (salaries and social security contributions for staff, material costs, further training, adult education, external school examinations, school hostel fees, etc.). The remaining funds come from other sources (communal budgets, preschool fees, etc.). The municipalities have to pay for investments and some material costs. The parents, or the pupils themselves, have to pay for textbooks and other school materials. However, the market price of the book only covers some of the book costs. Only underprivileged children, e.g., Roma children, have their school materials paid by the ministry, municipality, or charitable organizations. At present, a parliament (*Skupština*) is discussing whether all primary school children should be provided with books free of charge. This would cost the Treasury approximately another 4 million Euros.

Private schools and preschools are largely financed by school fees. Students have to pay to study at both state and private universities. All students have to pay administration fees, and approximately half of all the students also have to pay tuition fees, which amount to between five hundred and a thousand Euros per semester depending on the course. Students with good or very good grades are exempt from the tuition fees. Independent schools and institutions of higher education are allowed to charge fees within the statutory limits. Special services exceeding the facilities offered by a regular school (extracurricular activities, school hostels in the country, cultural trips, etc.) are charged separately. Some of these offers are therefore not realistic for underprivileged families, especially in view of the fact that the unemployment rate in Montenegro is one of the highest in Europe.

In the adult education sector, primary and vocational school programs are free of charge, while the other forms of further education and training are paid for by the state, by companies, or by the students themselves.

34.2.5 Relationship Between the Public and Private Sector

Private education was not permitted under the Communist government following the Second World War. Only with the rise of democracy in 2000 did the government's attitude toward private education improve. Since then, private educational facilities have been regarded as a matter of course in the Montenegrin education system and are based on the right of parents and children to select the type of education they are most convinced of. However, the conditions for opening private schools continue to be unfavorable since the Ministry of Education only subsidizes them to a certain extent. The school itself is responsible for investments and material costs. Private schools are obliged to comply with Montenegrin regulations. There are only a few private schools in Montenegro, including a grammar school for Albanian-speaking children in Ulcinj.

In terms of higher education, there are three private universities. The number of students rose rapidly in just a few years from 600 in 2007 to 3,800 in 2012. While private kindergartens and schools all receive state funding, the private universities are entirely self-financing, primarily through tuition fees, which can be up to 2,500 Euros. However, there are also cases where government study programs are declared to be study programs of public interest so that funds find their way to private universities. Nevertheless, this is met with public criticism as it is not clear what criteria are used for awarding the funds.

34.2.6 Quality Development and Support for Educational Facilities

In the former Yugoslavia, it was possible for someone to work in a preschool or school after only taking the relevant training course (secondary school level) or studying for 2 years at a teacher training college. Today, according to the new legislation, all education staff (teachers, headteachers, librarians, educationalists, etc.) is required a university degree. Despite this, only 70 % of primary school teachers meet these requirements. In contrast, 96 % of secondary school teachers (upper level) have completed a university course.

The program to become a teacher in a preschool or crèche was prolonged from four to six semesters, while a training course to become a class or subject teacher lasts from six to eight semesters. Attempts are being made to increase the number of male participants in courses for preschool teachers. There is no special training course for teachers in vocational schools. However, graduates of the faculties of technology, business, medicine, etc., are employed and then given supplementary teacher training. The Faculty of Philosophy of Nikšić University is the center for teacher training in Montenegro. Since the reform of the school system, a lot of work has been done to ensure that teachers are trained to teach several subjects. Since 2004, the University of Montenegro in Podgorica offers a course to train primary school teachers who can give their lessons in Albanian.

After finishing their studies, the graduates complete a 1-year teacher training program, under the supervision of a tutor, culminating in the state examination (*stručni ispit*).

All the teachers, headteachers, and other pedagogical staff have the opportunity to take part in further training courses. According to the collective agreement for teaching staff, teachers are entitled to take up to 30 days off from work to attend in-service training seminars. The in-service training programs are organized by the education authority or the Center for Specialist Training. As already mentioned, after their appointment, headteachers are obliged to attend an in-service training program.

The in-service training programs offered as part of the reform in the school system include:

- *Primary schools*: in-service training for class teachers teaching Year 1 pupils educated in accordance with the 9-year system, in-service training for teachers of pupils in the higher primary school classes being educated in accordance with the 9-year system, “inclusive education” training for schools attended by children with special needs, social studies (*građansko obrazovanje*) modules and “basic computer science” for teachers of these subjects, “teaching English in the first cycle of primary schools” module for teachers of English in primary education
- *Grammar school*: in-service modules, “changes in the grammar schools and new educational programs,” “assessment in lessons,” “methods used in lessons,” “using IT in lessons”
- *Vocational schools*: how to implement the new educational programs, in particular for the “dual system”
- *School management*: program for heads of educational institutions

The education authority and the Center for Specialist Training are responsible for assessment and supervision. Proposals are made regarding the further development of educational plans, the teaching technology, and methods based on the analysis of the development of the education system, pilot projects, and experiments. This involves a collaboration between the school authority, the Center for Specialist Training, and the examination center.

34.3 Overview of the Structure of the Education System

Currently, education in Montenegro comprises

- Preschool education (*predškolsko obrazovanje*)
- Primary school education at the primary and lower secondary level (*osnovnoškolsko obrazovanje*)
- Specialist training at the secondary level (*srednje stručno obrazovanje*)
- Grammar school education at the secondary level (*gimnazijsko obrazovanje*)
- Higher education (*visokoškolsvo*)

- Musical, artistic, and ballet education at a primary and secondary level (umjetničke škole)
- Adult education (obrazovanje odraslih)
- Education for children with special needs (obrazovanje djece sa posebnim potrebama),

which together represent Montenegro's uniform education system.

At all levels of primary and secondary education, the academic year begins on the first Monday in September and runs for at least 180 days or 36 school weeks. Pupils in their final year (the Year 9 in the primary schools or the final class before leaving the vocational schools and grammar schools) must have completed their lessons by 15 May. During the academic year, there are school holidays lasting 2 weeks in winter and 1 week in spring. The long summer holidays (lasting approximately 2 months) begin at the end of the school year. Pupils at grammar schools also have 1-week school holidays in autumn.

34.3.1 Preprimary Education

The 108 preschools (in 2011) can be divided into two groups:

- Crèche/kindergarten (*jaslice*) for children aged between 1 and 3
- Preschool (*vrtić*) for children aged between 3 and 7

In 2011, 14,155 children attended institutions of this kind, equivalent to one-third of all children in this age cohort (up to 6). The number of crèches and preschools is constantly increasing as well as the number of children enrolled (from 2006 to 2011 by approximately 50 %). The constantly low number of enrollments is due to the small number of preschools and crèches. Approximately 95 % of all preschool teachers are female, and the ratio of teacher to pupil is approximately 1:9. In the crèches, there are groups of 8–14 children and in the preschools 18–30 children, with each group being supervised by 2 teachers.

Preschool education is an integral part of the reform in the education system instigated in 2001. Accordingly, on the basis of the principle of democracy and pluralism, each child is entitled to take part in a preschool education program. By means of a collaboration with other social partners and the local administration, the programs aim to promote a child's physical and psychological development. Not only general but also specialist educational programs are offered, especially to children with psychophysical disabilities. In addition to foreign language lessons (in particular English), art, ballet, music, sport, and puppet theater activities are included. The length of time spent at preschool varies between the whole day, half a day, and a short stay.

The competent municipal administration organizes enrollment in the primary schools together with the schools. Children used to start school at the age of 7 in Montenegro, but now, they begin when they have reached the age of 6 or at least 5 years and 8 months on 1 September.

34.3.2 Primary and Lower Secondary Education

Since 2004, the implementation of the 9-year academic education system, combining primary and lower secondary education, has been taking place at the primary schools (*osnovna škola*) in Montenegro. All children between the ages of 6 and 14 have to attend school. Therefore, the attendance of the primary school is compulsory, but also free of charge, for children of the relevant age. The census in 2011 revealed that only 95 % of all children attend school. The majority of those who do not attend school are Roma children as only every second Roma child is lucky enough to have an education.

The new 9-year school program is based on the following principles: as far as learning is concerned, quality is more important than quantity; every individual pupil's personal development must be supported; primary school education serves as the basis for the following secondary education and/or vocational training; pupils, teachers, and parents shall collaborate; children with special needs shall be integrated; and the teachers shall be autonomous in their lessons.

The new 9-year education system was based on the Slovenian school system and was divided into three cycles each consisting of three academic years:

In the first cycle, Years 1–3 focus on the native language and literature, mathematics, art, music, nature study, general studies, and physical education. In areas where the majority of the population is Albanian, their native language is also taught. This subject (a maximum of 20 lessons a week) is taught by class teachers assisted by a preschool teacher in the first year. Grading takes the form of written assessments. It should be noted that teaching the native language (*maternji jezik*) at all levels of school includes Montenegrin, Serbian, Croatian, and Bosnian language and literature since these four languages stemmed from the Serbo-Croatian language following the collapse of Yugoslavia, but linguistically continue to be one language.

In the *second cycle*, from Years 4 to 6, class teachers are joined by subject teachers to ease the transition from the first to the third cycle. In addition to their own native language and mathematics, pupils learn their first foreign language (usually English), art, music, physical education, general studies, nature study, nature and technology, technology, and computer science. In Year 6, the subjects social studies, history, and geography are added to the timetable and are continued in the third cycle. In this cycle, a numerical grade is given in addition to the written assessment using a scale from 1 (unsatisfactory) to 5 (excellent). The maximum number of lessons per week is 26.

In the *third cycle*, from Years 7 to 9, in addition to the native language, the subjects mathematics, first foreign language, art, music and geography, history, physics, biology and ecology, and chemistry are taught exclusively by subject teachers. In the third cycle, optional compulsory subjects are added to the timetable and allocated five lessons a week or 20 % of the total number of lessons taught per week, which are at the most 30. The second foreign language is one of the optional compulsory subjects.

Native language lessons account for 19.9 % of the total number of lessons per week and mathematics for 17.3 %. Scientific subjects, biology, chemistry, and physics, account for 7.8 % of the lessons. In addition, the ancillary subjects, such as nature study, nature and society, and nature and technology, account for 6.3 %.

Lessons with the class teacher; extracurricular activities, such as cultural trips, sports days, and technology days; visits to school hostels in the country; and extra coaching for weak and/or talented pupils play a significant role in the new system. The 45-min lesson is introduced gradually as of Year 4. In the first three academic years, emphasis is on blocks of lessons, where each teacher is allowed to plan individually taking into account class dynamics and the way the day is structured. Talented pupils have the opportunity to complete two academic years in one calendar year. The maximum number of pupils in 1 class is 30. In small towns, classes can be combined.

The introduction of the 9-year primary school system began in 2004/2005 with 20 pilot projects and has not yet been fully implemented in all schools.

34.3.3 Upper Level of Secondary Education

In Montenegro, there are two types of upper secondary education:

- Academic grammar schools (*gimnazija*)
- Vocational schools (*srednje stručne škole*)

The structure of the 22 Montenegrin *grammar schools* is based on the *Book of Changes* and follows on the principles of the unity of science (the possibility to learn about all the sciences), of the pluralism of culture and knowledge, of the possibility to choose, and of the promotion of talent. The grammar schools are academic secondary schools which serve the purpose of preparing young people to study at universities and other institutions of higher education and ensuring cultural development and education in the spirit of universal humanistic progress. Grammar school pupils only account for one-third of the 31,914 pupils (2011) who attend a secondary school. Therefore, one of the main goals of the reform in the education system is to increase the number of grammar school pupils to 40 % of all secondary pupils. The grammar school syllabus is also offered by private grammar schools as well as in mixed secondary schools (*srednje mješovite škole*), which also offer vocational school programs.

In contrast to the different types of grammar school (scientific mathematical, sociolinguistics, the philological and mathematical grammar school) that previously existed, Montenegro has been introducing a uniform 4-year academic grammar school (*opšta gimnazija*) since 2001 consisting of an academic core education and optional compulsory subjects. The number of lessons per week in optional compulsory subjects constantly increases and in the fourth year accounts for a quarter of the lessons. In Plav, Tuzi, and Ulcinj, Albanian-speaking grammar schools are offered.

The compulsory subjects taught during the 4-year education at the grammar school are the native language and literature, mathematics, the first foreign language, the second foreign language, history, sport, fine arts, Latin, geography, biology, chemistry,

physics, psychology, sociology, philosophy, and computer science. In the Albanian-speaking grammar schools, Albanian is added to the timetable. While the native language and mathematics each account for 12.3 % of the lessons, biology, chemistry, and physics each make up 4.7 % of the curriculum. In addition, there are between three and eight lessons of optional subjects depending on the age of the pupils. Pupils can select such subjects as a third foreign language (English, French, Italian, Russian, Spanish, German), social studies, general linguistics, theory of literature, mathematical functions in physics, problems in physics, ecology, chemistry and life, art and visual communications, sport, and communication science. These are supplemented by optional compulsory content: school trips, project groups, culture and art trips, sports days, social work, research projects, etc., which together account for a maximum of 33 lessons. It is interesting to note that religious education is not taught.

As in the primary school, the pupils are given a grade on the basis of a scale from 1 to 5. Should some pupils have one, two, or three bad grades, they are allowed to re-sit a board examination in August to try to improve these grades. Should any of the pupils fail this examination, they have to repeat a year. Pupils are only allowed to repeat the same class once. Special programs are offered to particularly gifted pupils. Moreover, they have the option of jumping a class.

The *vocational schools*, which have played an important part in the education system since the reform, are based on the following principles: modernizing vocational training and adapting it to the needs of contemporary, democratic, and economically developed societies and market economies; ensuring that pupils and adults have the opportunity of participating in specialist training courses, which will enable them to compete on an equal footing on the labor market; imparting knowledge and skills necessary for work, life, and further education; lifelong learning; making Montenegro's specialist training system compatible with the systems in well-developed, democratic states.

There are a total of 37 vocational secondary schools (26 vocational schools and 11 vocational and academic secondary schools – the mixed secondary schools), in which 21,000 pupils are enrolled. There are approximately 80 training courses, divided into:

- Three-year vocational school programs (medium-level vocational training)
- Four-year vocational school programs (medium-level vocational training)

In Ulcinj and Plav, 3- and 4-year vocational school programs are conducted in Albanian.

A 2-year technical college (*više stručno obrazovanje*) was supposed to supplement the vocational school education of at least 3 or 4 years by providing postsecondary education. The technical colleges provide nonuniversity vocational training at a high level. Work on founding such schools was initiated in collaboration with Slovenia's Ministry of Education in 2008; however, it has not been completed to date.

External "social partners" (*socijalno partnerstvo*) play a major part in developing the new syllabuses. In particular, the Chamber of Commerce and the trade associations support the education authority in their efforts to develop, implement, and conduct new training programs.

The curriculum is divided into compulsory academic subjects and optional technical subjects. The compulsory academic subjects are common to all courses, whereas the optional technical subjects comprise vocation-related material. The lessons are divided into theory, academic and technical exercises, practical training, optional and additional lessons, examinations, on-the-job technical training, and free activities.

Only in exceptional cases may the number of students per class exceed 30 and then at the very most 32. The number of lessons per week may not exceed 32. If the dual vocational training system works properly, then theoretical and practical training should not take more than 38 lessons a week. Vocational training is offered in a regular or special course.

The pupils are given a grade on the basis of a scale from 1 to 5. Should pupils be given a bad grade in one or several subjects, then they are allowed to re-sit a board examination.

The vocational training courses are taught by subject teachers, specialists (pedagogues, psychologists, sociologists), members of the staff (laboratory assistants, librarians, etc.), and heads of practices. All teachers should have a university degree, or the equivalent thereof. Only in exceptional cases can lessons be taught by teachers who have attended technical college. Practical training is given by heads of practices with a master craftsman's certificate and teacher training.

There is a special type of school at the primary and secondary education level: the art, music, and ballet schools (*umjetničke škole*). There are a total of three music and ballet schools and one art school at the primary and secondary education level and a music primary school in almost every municipality, which had 2,671 pupils in 2005. While the music primary schools are founded by the municipalities and are only attended by pupils as a supplement to the regular primary schools, the music, ballet, and art schools at the secondary education level are founded and financed by the Ministry of Education. The 4-year secondary music or art schools offer full-time education and cannot be attended for supplementary education, as is the case with the music primary school. The aim is to train young artists and musicians, who can continue their university education at the faculties of music, theater, and art in Cetinje. In contrast to the primary schools, grammar schools, and technical colleges, the reform of the art and music schools is still at a very early stage.

34.3.4 Special Schools

Pupils with special needs include mentally and physically disabled children, children with chronic and long-term illnesses, and children with learning difficulties. The Ministry of Education has to provide these children with a suitable education, if necessary, with the involvement of specialists. Four hundred pupils attended five special schools in 2011. There are however approximately 7,000 disabled children. This means that only 5 % of these children attend special schools.

Since 1997, the Ministry of Education has been conducting projects to implement an inclusive education system (*inkluzivno obrazovanje*) in collaboration with various international organizations, such as UNICEF and Save the Children.

Disabled children are to be given the chance to be integrated into regular kindergartens and schools in accordance with the principles of “equal opportunities,” “education for all children,” and “choosing on the basis of individual capabilities.” Only if integration is not successful is a child to be educated in a special school. The curriculum is adapted to the needs of each individual pupil.

Teams consisting of two teachers, a school psychologist, a pedagogue, the headteacher, and the deputy headteacher in dozens of schools were given training to make “inclusive education” possible.

34.3.5 Tertiary Education

Legislation on higher education guarantees the autonomy of teaching, science, and art at Montenegrin institutions of higher education and of the academic staff teaching there. In Montenegro, there is a state university – the University of Montenegro. This university was founded in the 1970s, when many other universities were established in the former Yugoslavia, and constantly extended. Today, there are 20 faculties based in Podgorica, Nikšić, Cetinje, Kotor, Herceg Novi, and Bijelo Polje. These offer the full range of courses (approximately 80 degree courses) to more than 18,390 students studying in the 2011/2012 winter semester. It is interesting to note that such courses as seafaring; all the art sectors, tourism, etc., are offered despite the fact that Montenegro is a very small country in terms of population. Three scientific institutions are also based at the university.

The teachers for the primary and secondary level are trained at the Faculty of Philosophy in Nikšić. There has been a separate course for Albanian-speaking primary school teachers in Podgorica since 2004. The course is a cooperation between the Albanian universities in Skadar and Tirana.

Most of the courses are planned to last for eight semesters, while the postgraduate/intermediate courses last for four semesters. Since 2004, the introduction of the first bachelor courses lasting a minimum of 3 years and the first master programs lasting a maximum of 2 years has been taking place. In addition, a 1-year specialization course and a 3-year Ph.D. course are offered. The curricula are updated, and new courses of study are implemented. The use of the European Credit Transfer System (ECTS) is compulsory for all the institutions of higher education. This means the university reform takes a special place in the reform of the education system. At the same time, the first private universities were accredited (at present, there are two private universities and one private institution of higher education).

The Council for Higher Education (*Savjet za visoko obrazovanje*) is responsible for the legal structure of higher education in the Republic of Montenegro. Regular and extraordinary professors and lecturers teach at a faculty. These are alone required to hold their doctorate. Lecturers at colleges of arts must have a university degree and the required experience.

34.3.6 Adult Education System

According to the legislation, adult education is an integral part of the uniform education system in the Republic of Montenegro. A distinction is made between general education (primary school education, grammar school, and vocational school/technical college education), retraining, further education and specialization, further education for the unemployed, further education aimed at attaining a higher level of knowledge, education in the area of democracy and society, learning foreign languages, training aimed at protecting the rights of national and ethnic minority groups, and further education for adults with special needs. The school programs may be designed to last between 1 and 3 years. The Council for Adult Education (*Savjet za obrazovanje odraslih*) is responsible for the syllabus of the further education courses.

Adult education is organized by the schools, adult education centers, and further education centers, while the Center for Technical and Vocational Training (*Centar za stručno obrazovanje*) is responsible for the final examinations. The three major adult training centers (*radnički/narodni univerzitet*) in Herceg Novi, Podgorica, and Nikšić play an outstanding role in adult education.

34.4 Developments in the Current School System

34.4.1 Transition Between Levels of Education

The knowledge of primary school pupils is assessed following every cycle; in other words, they take examinations in their native language and mathematics after Years 3, 6, and 9, the first foreign language being added to the examinations after Years 6 and 9. The results of these examinations are very important for enrollment in schools at the upper level of secondary education.

Pupils who have “successfully” completed primary school (*osnovna škola*) and are not older than 17 are allowed to enroll in a grammar school. Should more pupils wish to attend grammar school than can be accommodated, a selection process takes place, whereby grades achieved in the third cycle of primary school, in particular the grades in their native language, mathematics, and the first foreign language, are decisive. Prizes in school competitions are also taken into account.

At the end of the fourth year of the grammar school, the pupils sit their *matura* examinations which have been organized and conducted externally by the Ministry of Education or by the examination center (*Ispitni centar*) since 2009/2010 and comprise the following subjects: native language and literature, mathematics or the first foreign language, and two optional subjects. Pupils who succeed in passing the external *matura* examinations can enroll directly in a university without having to take an entrance examination. Pupils who take *matura* examination based on the old, internal system will then have to pass an entrance examination before enrolling in an institution of higher education.

As is the case with the grammar school, pupils who have “successfully” completed primary school (*osnovna škola*) and are not older than 17 are allowed to enroll in a vocational school. If more pupils want to attend a vocational school than can be accommodated, there is a selection process. Pupils, who successfully complete a 3-year vocational training course, are allowed to enroll at the next level, provided that they catch up the missing subject(s) by taking (an) external examination(s). At the end of the vocational training course, the student sits the relevant examination (*stručni ispit*) upon finishing the 3-year and 4-year vocational school/technical college. The vocational examinations passed at the end of a 4-year vocational school/technical college are equivalent to the *matura* examinations and can be used to enroll in a university since they are evidence of a broad academic education. Pupils leaving the 3-year vocational school/technical college are given the opportunity of sitting a vocational examination following an additional 1-year training course at a 4-year vocational school/technical college in order to obtain a *matura* certificate.

The state examination center (*Ispitni centar*) is responsible for all examinations in primary and secondary education (both lower and upper level). This center was founded in 2005 and assigned the task of preparing and conducting the external examinations in primary schools, grammar schools (particularly the *matura* examination), and the vocational schools to enable a nationwide comparison of examination results.

34.4.2 Integration Measures and Dealing with Special Problems

Above all, more attention will have to be paid to two topics if Montenegro wants to implement a modern, satisfactory system. Firstly, *the education of children from ethnic and linguistic minorities* – from the point of view of population, Montenegro is a very multinational country. Serbs, Montenegrins, Croats, Muslims, and Bosniaks take part in the lessons on account of the common language in accordance with the “native language syllabus and curriculum.” In contrast, Albanians and Roma are given “minority group” lessons, which have proven to be insufficient. Only 50 % of all Albanian children have the opportunity of taking part in lessons held in Albanian. Although some progress has been made, there is still a need for improvement in the area of integration with regard to teacher training and the publication of textbooks in Albanian. The education situation is even worse for the Roma population. Among the Roma in Montenegro, there are also refugees who fled from the Kosovo war. In its work with Roma children, the Ministry of Education has decided to focus on the following points: in-service training for teachers, teacher’s books and materials free of charge, the inclusion of Roma-related content in the syllabus, and a general increase in the number of Roma children attending primary and secondary schools.

Secondly, *the education of children with special needs* – although a large amount of work has been done in the area of special schools, this does not fully satisfy the children’s needs. The task now is to find how to improve the integration of children with special needs into normal schools or how to offer these children a suitable education.

34.5 New Developments

One of the most important features of every education system is the capability to adapt this system continuously to the current needs of society. A long-term education system stands out through the inclusion of applied sciences which enable pupils to take an active part in society. The general visions and goals of the education reform in Montenegro were published in the *Book of Changes* in 2001. Since then, the following progress has been made:

- Devising important documents (laws, regulations, and guidelines) to create a basis for further activities
- Decentralizing systems: founding new authorities (school authority, Center for Vocational Training, the examination center, etc.) at state level and transferring all the powers to the schools and the municipalities
- Devising new course plans in the primary and secondary education
- Compiling new textbooks
- Implementing the 9-year primary school system step by step
- Implementing more than a dozen new programs in the area of vocational training, including the dual system of vocational training
- Creating a course for Albanian-speaking primary school teachers
- In-service training for teachers at all levels
- Introducing external examinations in primary schools

Despite this, only the first steps have been taken thus far, and the Ministry of Education and partners are still faced with a large number of tasks: decentralizing the school system further (more participation by teachers and pupils, transferring certain powers to the municipalities), making schools and lessons more democratic (strengthening democratic values in lessons and in school management), training in special areas (giving more teachers further training in implementing the 9-year primary school system and in all kinds of secondary schools and giving preschool teachers as well as headteachers in-service training), linking schools to modern media (more PCs in schools, expanding internet networks, introducing “basic computer science” lessons), integrating children with special needs into the school system, and introducing new textbooks (at all levels of education). Depending on the level of education, the following tasks are very important:

Primary schools: introducing the 9-year school system at all levels and in all schools, introducing new course plans and textbooks for all subjects, and external examinations in the main subjects at the end of each cycle

Grammar schools/secondary schools: introducing new course plans and textbooks at all levels, introducing new vocational training courses in line with the demands of the labor market, closer collaboration with social partners (e.g., the Chamber of Commerce, etc.), and increasing the number of pupils completing the dual system of vocational training and grammar schools

Adult education: implementing new programs in night schools for primary and secondary education and expanding adult education courses on a nationwide basis
Institutions of further education: fully implementing the Bologna criteria in university courses and introducing new courses of study, in particular intermediate courses in methodology and didactics and general growth in higher education.

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Bob van de Ven

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B. van de Ven (✉)

Society for Educational Administration of the Netherlands, Poeldijk, The Netherlands

35.1 History and Social Parameters of the Education System

35.1.1 Cornerstones of Historical Developments

Toward the end of the eighteenth century, following the occupation by the French Army, the Netherlands became a sovereign state. The Hague was made the center of national government, from where changes to the school system were and continue to be controlled. In 1801, the first Primary Education Act was passed.

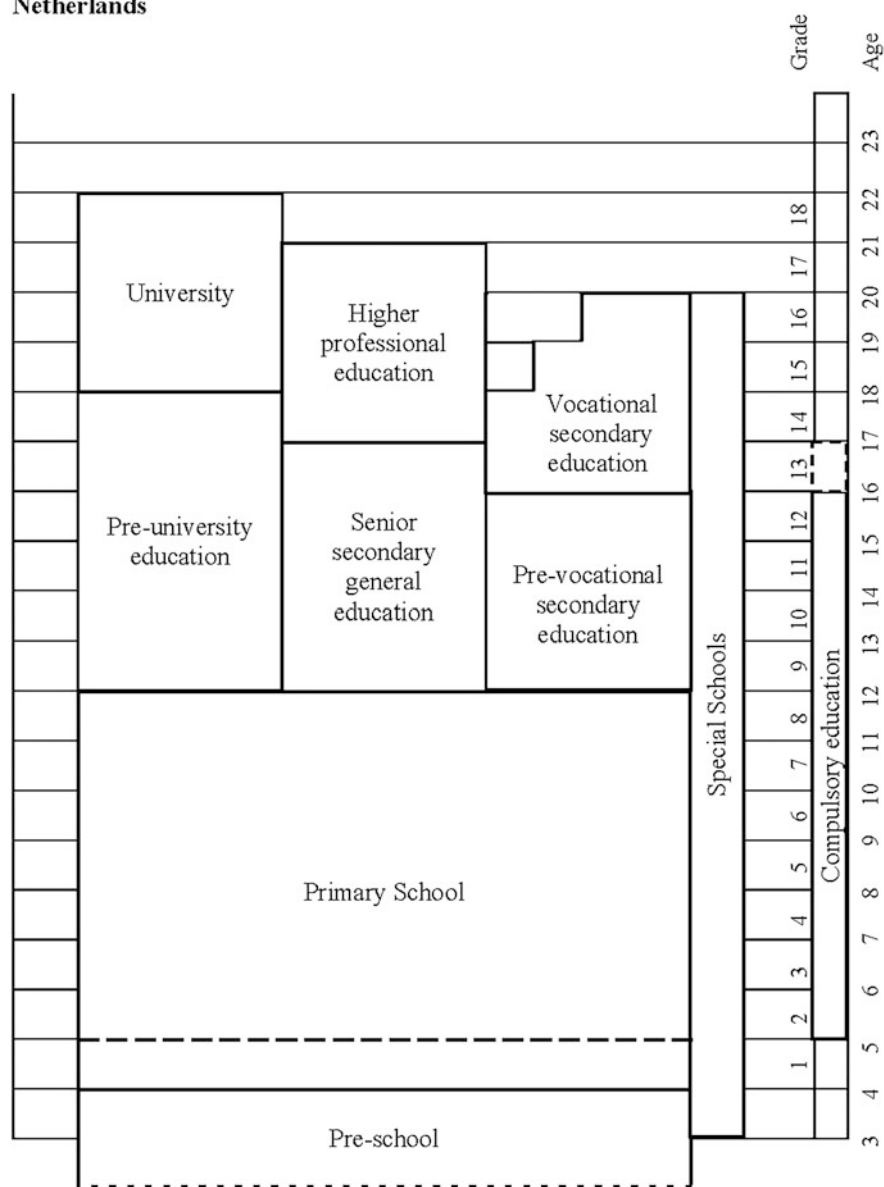
The Constitution of 1814 stipulates that the government shall constantly be concerned with the process of education. The main task of the education system was to broaden a pupil's knowledge and promote religion as a major pillar of the state. Article 23 of the current Constitution still mentions that the government is responsible for the education process.

In 1900, general compulsory school attendance was introduced. By that time, approximately 90 % of children were already attending primary school. There was little interest in secondary education at the time: in the period around 1900, more than 92 % of pupils did not attend secondary education after leaving primary school. It was believed that people had received sufficient education once they had completed primary school.

State public schools and private schools have existed side by side since 1801. The state schools at the time were municipal and village schools, French schools, and Latin schools. Private schools were founded by the churches, foundations, and private individuals. With the establishment of state and private schools, a long-lasting struggle developed, concerning equal treatment and financing. This struggle, which became known as the school funding controversy, was only brought to an end with the 1917 Schools Act and the so-called educational specification. Since 1917, the freedom of the individual educational facilities has been anchored in the Constitution and secondary education has been financed by the state. This put private and state schools on an equal footing, which means that the private schools are also financed by the state. However, much more important than state financing is the understanding that private individuals or an association have the right to establish schools. If a sufficient number of like-minded parents come together, they could establish a school. Of course, these are subject to certain regulations. First and foremost, quality has to be assured – the quality of school and the quality of the teacher training. Certain curricula and courses are also prescribed and there are central examinations in the secondary sector. Nevertheless, private schools have the right to employ teachers (and to dismiss them) and to shape the course of the school in line with their own ideas.

Still today, the education sector reflects the four various pillars of the Dutch society: Protestant, Catholic, a neutral pillar (Dalton schools, Montessori, Rudolf Steiner, etc.), and public schools. The state no longer has any schools of its own. In the past, there were still "Empire" schools (e.g., *Rijks HBS*), but nowadays the municipalities are the maintaining bodies of public schools.

Netherlands



35.1.2 Key Phases of Reform and Innovation

After the Second World War, more and more pupils attended secondary school, and greater value was attached to a school leaving certificate, since it opened the way to many interesting vocational training opportunities and jobs. In 1950, 45.2 % and, in 1990, 85.4 % of pupils aged between 12 and 18 attended one of the various forms of secondary education. This steady increase in participation in secondary education, in part brought about by a general trend toward democratization, led to the passing of a new law on secondary education. It was also to mark the beginning of a new reform. In 1968, the Secondary Education Act (*Wet op het Voortgezet Onderwijs*) was passed. Because this Act brought about changes to the entire education system, it also became known as the Mammoth Act. Several educational structures were introduced, namely, HAVO, MAVO, and VWO. Each of these “school types” prepared its pupils in a specific manner for further education: MAVO (duration, 4 years; junior secondary general education) above all for further vocational education, HAVO (duration, 5 years; senior secondary general education) above all for higher professional education, and VWO (duration, 6 years; preuniversity education) above all for university studies. One essential feature was that pupils could study further at a higher level, i.e., having completed MAVO, they could continue studying in class 4 of HAVO, and having completed HAVO, in class 5 of VWO. Another new feature was that in the final two years of each school form, six, or for VWO seven, subjects could be (more or less) freely selected. Only Dutch and one foreign language were compulsory. Not until 1993 was the lower school in MAVO, HAVO, and VWO altered (basic education). In 1998, the system in the upper school was also revised, with the introduction of a profile structure of specialist subjects together with developments which went by the name “Study House.”

35.2 Fundamentals, Organization, and Governance of the Education System

35.2.1 Educational Aims

As early as 1814, the Constitution of the United Netherlands mentions that education is an ongoing concern of the government “to promote religion as a fixed component of support for the state and to broaden knowledge” (Knippenberg and van der Ham 1993). It is described in much the same manner in Article 23 of the present-day Constitution. This Article obliges the government to provide the parliament with a state-of-education report each year. The government had, and still has, good reason to take care of education and its quality: ultimately, this is the future of the society. Investing in education means investing in human capital that is absolutely necessary to maintain and continue to shape a highly developed society. This is not just meant in a political sense: society stands to gain from a good education system in a social sense, too. The education of responsible citizens who

can maintain the key values of the Dutch political system is a fundamental condition for the stability and continued development of the system.

From a cultural perspective, it also makes sense to invest in education for it is only through the means of education that a cultural heritage can be passed on to the next generation in a targeted and comprehensive fashion. In addition, the development of individual talents makes a crucial contribution to enhancing the country's cultural heritage.

35.2.2 Legal Foundations

By and large, the following laws form the basis for the organization and governance of the school system:

Basic Education Act (Wet op het Basisonderwijs, WBO) of 1985

Article 8 of the *Wet op het Basisonderwijs* (WBO) states that the objective of teaching in primary schools is the broad education of pupils. In other words, teaching should be concentrated on the emotional and intellectual development of pupils, the development of creativity, and the acquisition of necessary social, cultural, and physical skills. Article 9 of the WBO states that “attainment targets” should be developed, all of which should serve a broad-based education. The “attainment targets” pursued by the schools are those objectives which pupils must achieve by the end of primary education. Section 3 deals with these attainment targets in more detail.

The WBO saw the introduction of a uniform “primary school” for children between the ages of 4 and 12, lasting 8 years. It also regulated the start of school: compulsory school attendance starts at the age of 5. On the first school day after the child's fifth birthday, the child is required to attend school. However, children can attend primary school from the age of 4.

Special Education Interim Act (Interimwet Speciaal Onderwijs en Voortgezet Speciaal Onderwijs, ISOVSO)

The ISOVSO was introduced for special schools. Teaching at these schools caters to children who, due to physical or mental handicaps, require greater assistance in education and learning than other children attending primary school.

The Primary Education Act (Wet op het Primair Onderwijs WPO) of 1998

Introduced in 1998, the Act regulates primary education, including special education for the primary sector. The intention was to promote collaboration between “normal” schools and special schools, in the form of joint ventures between the various responsible bodies, with simultaneous responsibility for the relevant combined structure. Primary education also concerns children from the age of 4 which means that there are hardly any kindergartens.

The Secondary Education Act (Wet op het Voortgezet Onderwijs WVO) of 1968

The WVO dates from 1963, but only became effective on 1 August 1968. Since then, a great deal has changed: above all, over the last few years major

innovations have been anchored in the law. In 1963, “basic education” (*basisvorming*) was introduced. From 1998 onward, or on request from 1999, schools were required to introduce the profile structure of specific subjects for the senior classes in HAVO and VWO under the implementation of the “Study House” concept. On 1 August 1998, the Act of 25 May 1998 became effective, according to which the structuring of MAVO and VBO (prevocational education) was fundamentally altered. Today, the term used is VMBO (prevocational secondary education), in which four learning tracks (*leerwegen*) can be distinguished: a theoretical learning track, a combined learning track, a job-oriented learning track, and a practical track. In the theoretical track, pupils may continue studies in HAVO education.

35.2.3 Governance and the Administration of the Education System

The government controls education through legislation, based on the provisions of the Constitution. The most important tasks of the government are the structuring, quality assurance, and financing of education. Its responsibility also extends to the public education institutions (in the municipalities), the Education Inspectorate, and the evaluation and financing of students.

The key cornerstones of governance in the Dutch education system include the following:

Decentralization

Over the last 15 years, the trend toward decentralization has also been clearly felt in education. The Ministry of Education has imposed ever fewer regulations, and schools bear ever more responsibility for their own work. The schools receive a fixed budget (“lump sum financing”) which they are free to spend as they see fit. The responsibility of the State for the quality of the education system of course remains. In connection with this, the tasks of the Education Inspectorate have also changed.

Evaluation and inspection

Since around 1980, the Dutch school policy has above all been focused on improving the quality of schools. At the same time, the responsibility for that quality has been increasingly placed on the schools and institutions themselves. Alongside such internal quality assurance, there is also a system of evaluation at the national level, in particular by the Dutch Education Inspectorate. The primary tasks of the Education Inspectorate are as follows:

- Monitoring whether schools and other educational institutions meet the quality requirements
- Gathering information continuously on the situation in education, for example, through regular visits to educational institutions
- Promoting innovations and new developments in education, for example, by disseminating details of experience within schools and regions among local authorities

Since 1998, the “Education Inspectorate (semi-independent status) regulations” have been in place. These regulations update the independent status of the Education Inspectorate, which had been initiated several years previously. The Education Inspectorate monitors and promotes the quality of education in Dutch schools and institutions. The Inspectorate reports on this situation to both schools and the Ministry and parliament.

Each school is required to inform parents of the existence of a complaints scheme within the school. All parents and anyone employed within the school have the possibility of addressing their objections to the relevant committee.

New tasks for headteachers

Clearly, as a consequence of these developments, the role of the headteacher is changing fundamentally. The headteacher must carry out tasks that in the past were the responsibility of the authorities and, as a consequence, has ever less time for teaching. As a result, new management models are emerging in schools, whereby the deputy headteacher is increasingly taking over the traditional role of the headteacher. A new layer of management is thus developing within schools, namely, the “middle management.” Because school authorities are autonomous in organizing the school in the way they see fit, Dutch schools are able to aim for greater professionalism in this respect and to further develop an effective organizational structure.

Making authorities more professional

An interesting trend is that of making municipal authorities more professional. This can be achieved by granting schools more administrative authority. If several schools work together with a single governing body, a governing board is sometimes established with a chair who takes on considerable administrative tasks for the community of schools. As a consequence, the authorities become further distanced from the schools and function more like a board of directors in the world of business. Another not uncommon model exists, whereby headteachers of the collaborating schools form an “intraschool management team.” In this model, the autonomy of the individual schools is better guaranteed than in the model with a school board, but it does impose considerable demands on the collaboration between the individual headteachers.

The board or the authority is responsible for horizontal and vertical tasks. In other words, they are not only responsible for the school policy managed within the school organization but also toward society, i.e., toward parents, municipalities, and the state.

School and society

School has increasingly become part of the society around it. Developments heading toward schools which are open from 8 in the morning until 5 in the afternoon, with a broad range of extracurricular activities, are more than simply a trend. Such schools already exist in major cities.

School is also increasingly becoming part of municipal politics. The municipality receives funding from the central government to offer additional learning assistance to children with learning deficits. In order to receive these funds, the

school has to negotiate with the municipality, whose influence in educational policy is increasingly growing. The educational policy is shifting increasingly from the central to the local government, in line with the decentralization of government policy in many other areas.

35.2.4 Funding

Since 1993 in adult and vocational education and since 1996 in general education (secondary sector), “lump sum financing” has been in force. This means that each school receives a fixed lump sum each year to cover all staffing and material costs. The amount depends on the number of pupils attending the school in the previous year. This clearly becomes a problem if pupil numbers start to fall. It is also a problem, however, if pupil numbers significantly rise. In this situation, the additional teaching hours must be covered from (available) reserves or – in the worst case – by creating larger classes. Lump sum financing above all allows the Ministry of Education to better plan education costs, but it also grants schools greater freedom. Although each school receives an amount for staff costs and another amount for material costs, each budget can be used to cover shortfalls in the other. In other words, computers instead of teachers are a definite possibility.

On the other hand, this lump sum financing method has had major consequences for schools and their authorities. A trend has emerged, for example, whereby the authorities governing private schools have sought greater collaboration with one another. Over the last few years, numerous authorities have merged, enabling them to more clearly and more independently operate their “own school policy.” This route has also been sought as a measure to provide a form of financial hedging, since under the lump sum financing method it is no longer inconceivable that a school could in fact become financially bankrupt.

35.2.5 Relationship Between the Public and Private Sectors

If we look at the Dutch education system, what is immediately striking is the autonomy of the schools and the freedom to establish schools. In the Constitution, the freedom to establish schools is clearly specified. The relationship between freedom and responsibility and the reduction of central control to the minimum necessary, so the characteristic of today’s Dutch education system, are rooted in the history of Dutch educational development and in the nature of the Dutch people. More than 70 % of schools in the primary and secondary sectors are private schools that are fully funded by the state.

Schools have a body that is responsible for administering the school. In the case of public schools, this is the municipality. Private schools have their own bodies. In the past, this used to be the Church, but this is no longer the case today.

Nowadays, this is likely to be a trust or an association. Since 1997, it has also been possible, for public schools, that the municipal council is not the authority, but a public legal entity within the framework of the Municipalities Act. The municipalities also have certain competences in respect to private schools. These include the administration of the school buildings and the distribution of funds for pupils who have fallen behind in their development. As a consequence, the current opinion is that the municipalities should no longer be directly involved as the authority responsible for public schools.

Private schools are administered by a trust or by an association. Most of the time, parents or parent representatives play a key role in the boards of such trusts or associations.

35.2.6 Quality Development and Support

As described above, the Dutch school policy has above all been focused on improving the quality of schools. At the same time, the responsibility for that quality has been increasingly placed on the schools and institutions themselves. In addition to the measures described, two instruments also play a key role:

School plan

Every 4 years, the school authority is required to draw up a so-called school plan in the form of a report on results and performance. The plan outlines how work has been carried out on improving quality and the results achieved. Each school is required to regularly evaluate its own quality. The results must be published in the school plan and form the basis for work within the school over the next 4 years. The coadministration committee at each school is required to approve the school plan. For the school authorities, the school plan forms the basis of information in respect to the developments in the school and in particular in respect to quality.

Quality charter

For every school, the Education Inspectorate produces a quality charter each year. This charter contains essential information about each individual school. The quality charter is published and available via the Internet. It publishes examination results together with the learning results of the pupils in the other classes. It also contains information about how many pupils have transferred to higher classes, how many pupils have repeated a year or have left school without a certificate, and how many pupils have proceeded to further education at a lower level. As a result, parents and of course the general public are provided with an impression of the performance of each school. To prevent schools from having a poorer overall result compared with schools with an entirely different school population, for example, in the case of schools with a high multicultural makeup within the pupil base, an attempt is made to only compare similar schools.

35.3 Overview of the Structure of the Education System

The Dutch education system is structured as follows:

- *Preschool upbringing and education*
- *Primary education* (for children between 4 and 12 years)
- *Special schools (both primary and secondary education)*
- *Secondary education* (from 12 to 19). Secondary education is divided into:
 - VMBO (prevocational secondary education, 4 years)
 - HAVO (upper secondary general education, 5 years)
 - VWO (preuniversity academic education, 6 years)
- *Vocational and adult education*
- *Higher education*
 - Professional university
 - University
 - Distance learning university

35.3.1 Preschool Upbringing and Education

Primary schools are intended for children between the ages of 4 and 12. Since 1985 (Primary Education Act), nursery schools have no longer existed; children now directly attend an integrated school. In the first two years (group one and group two), there still remains a considerable play element, but there is also a learning element that depends on the individual character of each child.

Although compulsory schooling officially begins at 5, most parents send their children to school when they are 4. Discussions are currently exploring the possibility of introducing compulsory schooling from the age of 4, not least to encourage allochthonous parents to also send their children to primary school.

Preschool education is anchored in social legislation and as such is the responsibility of the municipal authorities. The municipalities are responsible for the quality and financing of preschool education. At present, municipalities are attempting to increase capacity considerably. The preschool sector is divided as follows:

- Child day care centers for children from the ages of 6 weeks to 4 years old.
- Centers are also available for out-of-school care for children from 4 to 12 years old because they are also open after school hours and during school holidays.
- Nurseries for children from 2 to 4 years old. These were not originally conceived as regular child day care centers; the children are intended to attend only once or twice a week, in order to learn social skills and have an opportunity to play with other children.

These facilities aim generally to provide social and play functions and to stimulate the child's social, cognitive, and emotional development. Children are cared for in an educational environment and parents have the opportunities to return to work.

A special scheme allows children to attend school for a few days from when they are 3 years and 10 months old and to get used to school before it starts. On the day on which they reach the age of 4 years, they are able to attend school. Compulsory school attendance only starts from the first school day of the month after they reach the age of 5 years.

35.3.2 Compulsory Schooling

When a child is 5 years old, the parents are required to send that child to school. Compulsory school attendance lasts at least 12 academic years. As a rule, compulsory school attendance applies to all pupils up to the end of the academic year, in which they reach the age of 16. When compulsory school attendance ends, partial compulsory learning continues to exist. This lasts 1 year and requires the pupil during this time to follow a training program for a further 2 days in addition to completing schoolwork. If parents violate the compulsory school attendance legislation, a heavy fine can be levied, and indeed even more stringent punishments may be imposed. The municipal authorities have the task of ensuring that all children regularly attend school and to check that all children are registered at school. This also applies to private schools. Since 1995, the municipal authorities have also been allocated a central role in regional reporting and monitoring. This in turn means that they have a major task in registering early school leavers. As part of efforts to counter early school leaving, an action plan for the enforcement of compulsory schooling has been drawn up.

35.3.3 Primary Education

35.3.3.1 Private and Public Schools

There are approximately 7,000 primary schools in the Netherlands, all of which receive state subsidies. Approximately 30 % of these are public schools, and 70 % are private schools.

The public schools are administered by the municipal authorities or by a municipal committee. If they are administered by a committee, they are more independent of the municipal authorities. For a municipal school, the municipal council is the school authority, which decides upon the appointment of the headteacher and other teaching staff at the school.

Approximately two-thirds of all children attend a private school. These take numerous forms. The majority are Catholic or Protestant schools, but there are also Jewish, Muslim, and humanistic schools. In addition, there are Waldorf schools and

private schools established on the basis of a pedagogical theory rather than on a specific religion, for example, Montessori schools, Jenaplan schools, Dalton schools, and Freinet schools.

35.3.3.2 Aims of Primary Education

In primary education, the foundations are laid for the personal and intellectual development of all children. Within a specified framework (the attainment targets), schools are able to structure their teaching according to their own ideas. The WPO (Primary Education Act) stipulates the requirements to be imposed in this respect on schools and the “attainment targets” to be achieved. The Act contains a precise description of the minimum curriculum content that must be taught. Pupils at primary school must already receive teaching in scientific subjects but above all in the Dutch language and mathematics. Another important stipulation relates to the qualification of the teaching staff. The Education Inspectorate monitors this very precisely, to ensure that schools remain within the boundaries of legislation.

Nevertheless, schools have a plenty of leeway to shape schooling in line with their own ideas. They can set their own objectives and develop their own profile regardless of the composition of the pupil population. The schools are also free to develop their own didactic approaches. However, schools are obliged to inform parents about all key aspects of the school. This is usually done in the form of school brochures.

35.3.3.3 Education Provision

The law does not describe in detail how teaching should be provided in primary schools. The way in which teaching is provided, as well as its underlying principles with respect to educational theory and didactic structures, is a matter for the school and the teachers themselves. Generally speaking, pupils are split into eight different groups, according to age and academic level. Each child starts at the age of 4 in group one (the term “group” is now employed instead of “year”) and then progresses each year until group eight is reached. Groups one and two have a nursery school program, although the term nursery school is no longer used. The child now attends “primary school” and not nursery school.

It is also possible for this group structure to be altered, whereby pupils are classified according to learning levels. Even in traditional schools, however, increasing focus is being placed on the differences between individual pupils; teaching is becoming ever more individualized. Children usually remain at primary school for 8 years.

Even in groups seven and eight, pupils receive little teaching from specialist subject teachers. The majority of classes are taught by the group teacher. To facilitate the transition from primary school to the first year of secondary school, there are now secondary schools that work with a core team in the first year, in other words with a group of teachers who provide teaching in different subjects. This phenomenon is not common, however, in the Netherlands, because the majority of teachers are only trained to teach in one subject. The results in schools using this model are positive. The problem lies with the teachers, because they are required to prepare instruction for more than their own subjects.

35.3.3.4 Attainment Targets

In 1998, attainment targets for primary schools were defined by the government. The attainment targets describe what pupils must learn in terms of knowledge, insight, and skills. These attainment targets are supposed to have been achieved upon leaving primary school. There are two types of attainment target:

- Cross-curriculum attainment targets. These are attainment targets which relate to the development and promotion of general skills, and cannot therefore be attributed to a special area of learning. They relate to the entire range of teaching provided at primary school. There is a distinction among the following thematic areas: (1) attitude to work, (2) working according to a plan, (3) use of various study strategies, (4) self-image, (5) social skills, and (6) new media.
- Curriculum-based attainment targets. These attainment targets relate to a specific area of learning. Distinctions are made among: (I) Dutch language, (II) English language, (III) arithmetic/mathematics, (IV) humanities, (V) sport, and (VI) art. Humanities typically include the following subjects: geography, history, social studies, technology, environmental studies, health and life skills, and nature studies.

The attainment targets set in 1998 are described in some detail. The attainment target for “working according to a plan,” for example, includes the following:

35.3.4 Working According to a Plan

Pupils can make a plan and act upon it:

- (a) They can formulate objectives.
- (b) They can focus on a particular object.
- (c) In terms of simple problems, they can understand what the causes and consequences are.
- (d) They can draw conclusions from what has happened previously.
- (e) They can divide larger activities into steps and work out what needs to be done in each step.
- (f) They can judge retrospectively whether their plan was the right plan.
- (g) They can present the results of their work in the form of a talk, a project work, or a demonstration.

35.3.5 School Types in Secondary Education

Secondary education refers to all types of school that follow on directly from the primary school. The children are generally 12 years old and, together with their parents, they have chosen a school they would like to attend. The type of school they have chosen depends of course on their interests.

35.3.5.1 The First Phase of the Secondary Level (Lower Level)

The majority of schools form school communities offering VMBO/HAVO/VWO education. MAVO and VBO (prevocational education), as already described, were combined in 1999 to form VMBO (prevocational secondary education). VMBO still offers the theoretical learning pathway previously known as MAVO.

The first phase of the secondary level encompasses the 4 years of VMBO education and the first 3 years of HAVO (5 years, *hogere algemeen vormend onderwijs* = higher general education) and VWO (6 years, *voorbereidend wetenschappelijk onderwijs* = preparatory academic education). The focus is placed on the application of knowledge and skills, with considerable value being attached to common elements in the curriculum. The other intention of introducing basic education was to postpone the definitive choice of MAVO, HAVO, or VWO education while offering greater opportunities to promote the capacities of individual pupils during this educational phase. The introduction of basic education in 2006 can be viewed as something of a compromise between the proponents of the comprehensive school idea (in Dutch, *middenschool*) and those who were opposed to the idea of pupils receiving combined education after primary school. The result is the development of broadly varied school types. There are secondary schools which in class one have completely heterogeneous classes, containing pupils suitable for grammar school education together with pupils capable only of achieving the lowest learning pathway, VMBO. There are, however, other secondary schools in which even in class one the pupils are streamed according to different levels. In between, there are numerous variants. The school is free to choose whether basic education should last for 2, 3, or 4 years. Initially, the Ministry wanted to test the attainment targets that were to be achieved. However, because putting this test into practice would have required enormous time and effort and because the differences between the schools, each of which could select a different structure, were very considerable, this plan was dropped.

Given the evaluations that have been completed on the first years of basic education, the unfortunate conclusion that must be drawn is that the system has not generated the expected results. The majority of schools have not succeeded in establishing a system that lives up to the principles of basic education, namely, not only to provide pupils with knowledge but also to teach them skills and to establish a degree of coherence in what the school has to offer. From 2006, the Ministry has therefore adopted a liberal approach to the shaping of the first few years of secondary education.

In the new lower level of secondary education, attainment targets have been laid down for the various subjects, which contain a description of what pupils must acquire in respect to insight, knowledge, and skills. At the end of this lower level, the school is expected to have reached at least these minimum attainment targets.

In the first 2 years, pupils are expected to receive 1,425 h of lessons covering 58 attainment targets, in compliance with the core curriculum. This still allows a plenty of leeway for schools, which they can use for other activities and other teaching periods. Pupils are to receive 1,040 h of instruction per school year. From 2014, this will be 1,000 h.

35.3.5.2 The Second Phase in Secondary Education (Upper Level)

The targets formulated for the introduction of the “new second phase” were broad-based general education and sound preparation for a further educational career. After 1968 (“Mammoth Act”), education in the secondary sector did not change fundamentally. The introduction of basic education represented the start of further innovations. Above all, at the universities and universities of professional education, it was realized that the link between secondary education and further education was becoming increasingly problematic. Pupils were not used to working independently and their knowledge and skills were in part insufficient. They had been too “narrowly” educated as a consequence of the system of subject selection in the years immediately prior to the final examination (HAVO, six subjects; VWO, seven subjects). In 1998, the first schools began the introduction of the “new second phase,” and since 1999 this system has been applied to all schools. The “new second phase” highlights a number of changes. In the new concept, there is no longer a specified number of teaching hours for pupils. The point of departure is now the “student workload,” in other words, the time pupils should spend on their studies. In calculating the student workload, the average time required by a pupil to independently acquire a specified proportion of the study material serves as the basis. The assumption is thereby made that the total student workload per year is 1,600 h, namely, 40 weeks per 40 h.

The curriculum is structured as follows: all pupils have a *common component* in their studies. In this common component, they are taught Dutch, English, a second foreign language, general sciences, history and social studies, cultural education, and sport. In addition, they can select from one of four *profiles* or subject combinations:

- Nature and technology
- Nature and health
- Science and society
- Culture and society

Finally, a number of hours remain which the pupils can select freely.

No further regulations have been specified for the teaching program (curriculum, methods, and teaching aids). The school plan provides a description and justification of the selection of the curriculum and the didactic methods employed.

In 2007, changes were introduced in the distribution of lessons and subjects as a result of experience gained with the new program. For the VWO, mathematics is now compulsory for all pupils and there is more leeway in the choice of the second/third foreign language. A fundamental feature is that pupils are offered more subjects and are required to work more independently using multiple skills. Pupils are, for example, required to produce a “profile project.” This is a project in which they independently demonstrate the coherence between the subjects they have selected. Because they have more subjects and fewer hours are available for each of those subjects than in the old system, pupils are required to process the material more independently. At the same time, the role of the teacher is more to supervise the learning process than to stand in front of the class. Many schools have introduced

“independent hours.” For example, for the third teaching period in the timetable, the pupils are allowed to select the teacher whose class they wish to attend. In that period, supervised by the teacher they have selected, they are able to study and if necessary ask questions. This new didactic method is known as the “Study House.”

The whole system requires very much more from the schools, and much more time is required to introduce the system well in schools. The initial results are encouraging. However, it is already clear that this new form of working is particularly stressful for teachers and it is difficult for pupils to work independently. Many changes are also required in terms of the school buildings: pupils need much more space to work and of course many more computer facilities with internet connections are required.

35.3.6 Special Schools

Children with learning disabilities or with pronounced behavioral problems are generally not taught in normal schools, but in special schools. Generally speaking, however, an attempt is made wherever possible to encourage pupils to attend “normal” schools, under the credo “back to school together.” In other words, only in cases where it is truly impossible for the child to attend a normal school are special schools considered. The parents also prefer to have their child attend a normal school if this is at all possible. It is also important that the child be able to attend a school close to home, where he or she will meet other children from the neighborhood. A recent innovation is that children who were in the past eligible for special education today receive a personal budget from the Ministry which can be spent in the school they attend. Using this budget, the receiving school is able to organize special needs teaching and special pedagogical supervision. Together with this additional budget, the support previously provided to special schools is gradually being transferred to the other schools. An independent commission decides whether a child can be given such a “financial backpack.”

Meanwhile, a “duty of care” has been introduced for all types of school. This means that all schools in a region have to collaborate to ensure that the right educational services are available for each and every child. From 2011, the most suitable education has to be available for each child.

35.3.7 Vocational and Adult Education

35.3.7.1 Regional Training Centers (ROCs)

On 1 January 1996, the Adult and Vocational Education Act (*Wet Educatie en Beroepsopvoeding* – WEB) came into force. This merges the Acts on adult education and vocational education in a single statutory framework in order to establish closer coherence between these forms of education. In 1998, the establishment of the ROCs (Regional Training Centers) was completed. All schools for vocational education and adult education in a single region were merged under the

responsibility of a single authority. These centers now offer a full range of courses in adult education and vocational education. The centers encompass the general qualification structures for adult and vocational education. Private institutions can also participate in the national qualification structure.

The WEB also introduces measures to improve the transition between education and the labor market. National committees for vocational education provide for the development of a coherent structure of qualifications which describes the qualifications required to meet developments in professional practice.

Adult education has a variety of aims: preparation for vocational education, naturalization and the social integration of immigrants, and support for people who are personally or socially disadvantaged.

35.3.7.2 VMBO

Prevocational secondary education (VMBO) lasts 4 years and has a structure that includes both basic education and preparation for vocational education. VMBO is intended for pupils between the ages of 12 and 16. As described above, they can choose between four different programs or “learning pathways.”

35.3.8 Universities and Universities of Professional Education

In the Netherlands, a distinction is made between universities of professional education (HBO – higher professional education) and universities. The HAVO certificate grants admission to a professional university. In order to study at an academic university, the VWO or HBO certificate is required. Applicants who are at least 21 years old can also study at university, provided they pass an entrance examination.

For both universities and professional universities, a course of studies lasts on average 4 years. For some courses, however, the duration is 5 years. A degree in medicine lasts even longer.

The system of bachelor’s and master’s degrees was introduced in 2002 for both types of facility. Nevertheless, the difference in orientation between universities and universities of professional education will remain in place. At universities, the continuous structure will be dropped, and two phases will emerge: the bachelor’s phase and the master’s phase. For universities of professional education, current courses of study will be recognized as a bachelor’s degree. Beyond this, it will be possible to offer HBO master’s courses.

35.4 Developments in the Current School System

35.4.1 Transition Between Levels of Education

Following primary school, generally speaking at the age of 12, children transfer to secondary education. The receiving school decides whether a child will be admitted. In group seven, a start is made on preparing the pupils for their choice of

school. The first question posed, generally by the parents, is of course: which form of school is suitable for the child? This is not an easy question, because the choice is considerable. Although the child will be receiving basic education, there is a considerable difference if the child attends a school with MAVO/HAVO/VWO, a school with only HAVO/VWO, a *gymnasium* (separate grammar school), a “broad-based school” with VMBO/HAVO/VWO, or perhaps even a separate school specifically for MAVO education. There are a few of this latter group, but they do exist.

Primary school education is very individualistic. In group eight, all pupils in the Netherlands are tested using the so-called Cito test.¹ The result is a specific level which in turn is mapped to the various school types available in the secondary sector. The Cito tests mathematical skills and linguistic knowledge. The majority of schools also operate a second form of testing which encompasses more personality characteristics across a broader spectrum (e.g., whether a pupil is able to concentrate well, whether a pupil has sufficient social skills, etc.). The recommendations of the headteacher at the primary school and of the class teacher are also very important. In other words, there are three criteria used to decide on the school type to which a pupil will be admitted.

In order to generate interest among primary school pupils for a particular secondary school (after all, there is considerable competition among the schools for pupils), “open days” are organized. During these open days, pupils and parents are able to visit secondary schools to gain an impression of the school and the teaching staff. Many secondary schools also offer the possibility for pupils at primary school to attend lessons in secondary school for a day or part of a day. Considerable attention is focused on organizing the transition from primary school to secondary school in the most pupil-friendly way possible.

Because pupils still receive basic education during the first few years at secondary school, it is possible to switch to a different teaching program (school type) after the first year. This is often possible within a single school, but it may also be necessary to find a different school. Because this is the most unfavorable option, however, for the pupil in question, considerable care is taken in the choice of school.

Under the working title “Back to School Together,” all primary schools have been encouraged to teach as many pupils as possible who previously went to special school. This was described in some detail above. The last report presented by the Education Inspectorate suggested that schools are finding it increasingly better to deal with differences between pupils.

35.4.2 Quality Development and Assurance

The results of different schools are increasingly entering the public domain. Schools have to learn to deal with this fact and to implement an active “policy”

¹*Centraal Instituut voor Testontwikkeling* (Central Institute for Test Development in the Netherlands).

as a result. All schools aim to evaluate their teaching and their results, to take all necessary measures in response, and to publish information about those efforts.

35.4.3 Dealing with Special Problems

Particular problems facing schools in the Netherlands concern demographic developments and the shortage of teachers.

One major demographic development is the increase in the average age of teachers. At present, the average age in the secondary sector is already 45 years, as a result of which the desirable balance between older and younger teachers no longer exists. In the coming years, many teachers will leave the profession upon reaching pensionable age. In addition, very few young people are opting for the teaching profession because interest in this profession has fallen considerably. If no fundamental measures are taken, there will be an enormous teacher shortage within the foreseeable future. At the end of 2007, an “Action Plan for Teachers” was published. A special commission was set up to look at the shortage of teachers facing schools today and tomorrow and suggested measure primarily focusing on:

- Promoting the teaching profession
- A more professional school with a stronger school management
- Better salaries for teachers and more promotion opportunities
- Financial impetus for in-service training

35.5 New Developments

35.5.1 Making School Management More Professional

The Dutch Headteachers’ Academy (NSA) has been set up for the headteachers of primary schools. This provides training for future headteachers of primary school which has to be completed before teachers can hold such a position. Nearly all headteachers appointed now are attending or have attended this academy. Most teacher training facilities also offer headteacher programs.

35.5.2 The International Perspective

Policy makers are currently looking into how to better anchor international aspects into the education system. Schools are being encouraged to take part in international and European programs and meet European dimensions of education in the curriculum. Three organizations are active in this:

- The “European Platform” for primary and secondary education (www.europeesplatform.nl)

- CINOP for vocational and adult education (www.cinop.nl)
- “Nuffic” for universities of professional education and academic universities (www.nuffic.nl)

35.5.2.1 Project for Gifted Pupils

After attention had been focused on low-achieving pupils for many years, it was felt that excellent and gifted pupils had been left short. Gifted pupils can cause and have problems of their own. Primary schools now receive special project funds if they organize activities for these pupils and challenge these “top pupils” to achieve top results. In the meantime, there is a digit “top school” (www.beterweters.nl) that provides teaching materials, games, and information for and about gifted children.

35.5.2.2 School and Technology

One problem facing the education system is that too few pupils are interested in technical subjects and in taking technical degrees. Attempts are currently being made to promote interest and one of the initiatives concerns the establishment of the so-called *technasien*. A *technasium* is a *gymnasium*, but for pupils who are looking to focus on technical disciplines. These technical grammar schools work closely with technical universities; curricula have also been developed in conjunction with these universities. In addition, special programs are offered at the universities.

35.5.2.3 Dropouts (Pupils Leaving School Without Any Qualifications)

Each year, thousands of pupils leave school without a certificate or any qualifications. The Ministry is looking to cut this dropout rate significantly and improve the numbers of school graduates. The municipalities are also playing a key role in this, not least because they are the supervisory body for school truancy. Compulsory schooling officers work together with schools and conduct extra controls at schools. The school inspectorate gathers and publishes all data related to truancy and the dropout rate, which is available for anyone to see.

35.5.2.4 The School at the Focus of Public Attention

For many years now, an intense public discussion has been taking place on the quality of education. Can pupils still master their mother tongue and basic skills in mathematics? And what about teachers? Are they sufficiently well qualified? Headed by a university professor, a campaign group has been formed “Better Education in the Netherlands (*Beter Onderwijs Nederland, BON*).” This aims to provide a counterweight to the new educational principles (new learning and teaching) in favor of more traditional teaching. Never before has so much been spoken and published about education and in such an undifferentiated manner. Still, the Netherlands is one of the top ten countries in PISA studies.

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N. Volckmar (✉)

Norwegian University of Science and Technology Trondheim, Trondheim, Norway

T. Werler

Bergen University College, Bergen, Norway

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36.1 History and Social Parameters of the Education System

36.1.1 Cornerstones of Historical Development

The roots of the Norwegian education system go back to 1739 and the “Ordinance governing country schools in Norway”. The ordinance was instigated against the backdrop of the unification of Norway and Denmark and the state pietism under the Danish-Norwegian King Christian VI. The introduction of compulsory confirmation in 1739 was intended to provide an adequate basis for a life in harmony with the pietistic Lutheranism. As a part of these efforts, the compulsory primary school (*allmueskole*) was created for everyone who had not secured any other form of education. Education became compulsory for all children from the age of 7–10 (12) covering at least 3 months per year. The major responsibility of the school was to provide religious and moral education; Christian religious education lessons and reading were mandatory. A central aspect of learning was a book that served as an explanation of the Small Catechism of Martin Luther. It comprised 757 short questions and the appropriate answers and was intended to be learnt by heart. The key focus on religion in schools up to the middle of the nineteenth century led to school being described as church school. In organizational terms, school was a mobile facility set up in local farmyards and teachers, who gradually became subject to a 6-month training and received board and lodging. For the more prosperous town population, there were also higher schools (*børgerskole*, *latinskole*) (Telhaug and Mediås 2003; Werler 2004).

Gradually, demand rose for longer instruction, for an extended canon, and for school buildings. The Law on General Country Schools (1860) marked an important milestone in the transition to new political ideas and the transition to a more modern world. General knowledge was placed on an equal footing with religious-moral education. The break with the old tradition finally came with the Law on Primary School (1889) that provided for a common 5-year school education free of charge. This marked the beginning of the Norwegian comprehensive school (Slagstad 1998; Telhaug and Mediås 2003; Werler 2004).

Implementing the comprehensive school represented the first efforts towards creating equality of opportunity. Subsequently, the middle school assumed the responsibilities of the higher schools which meant that the old languages were removed from teachings in school. In 1896, a new gymnasium type of school was introduced which offered a practical line and an English line in addition to the traditional Latin line. In 1920, the *Storting* (parliament) agreed a motion introducing the 7-year primary school as a school for all which became anchored in law in 1936.

The school between 1800 and 1930 could be described as the school of the national state. Its program was very much focused on preserving national culture,

Norway

		Grade	Age
	Master	17	23
	Bachelor	16	22
	Tertiary vocational education (between 6 months and 2 years)	15	21
		14	20
	Vg 3	13	19
Academic school	Vg 2	12	18
	Vg 1	11	17
	Vocational school		16
	Lower secondary school	10	15
		9	14
		8	13
		7	12
		6	11
		5	10
	Primary school	4	9
		3	8
		2	7
		1	6
	Kindergarten		5
			4
			3

Compulsory education

its language and its history. Although its influence had been significantly rolled back, the church still exerted considerable influence at this level. Gradually however, the church increasingly ceded its power to teachers and laymen (Telhaug and Mediås 2003).

Between the two world wars, the Peasants Party and the Labor Party reached a compromise agreement that resulted in an ideological turnaround for the Labour Party (DNA). From a party purely for the working classes emerged a social democratic people's party. For the first time in its history, in 1935 Norway was governed by the Labor Party, a key prerequisite for accepting and establishing the concept of a welfare state (Wiborg 2004). An important task of the Norwegian welfare state project consisted in the internal democratization of the education system.

In the years leading up to World War II, the DNA began unifying the different types of school, placing them on an equal footing. The 7-year primary school continued to form the basis for a separated secondary education, divided into secondary modern and grammar schools on the one hand and the *framhaldsskole*, which provided general vocational education on the other (Telhaug and Mediås 2003). These developments continued after World War II. A generation change within the DNA allowed new visionary politics to be pursued. One of the key elements of the new policy concerned efforts to extend the 7-year single type of primary school. Although Norway had established a 7-year single school at an early stage, other countries (Sweden, USA) were quicker to introduce a 9-year single school. Only in 1969 after numerous experiments and trails was the compulsory 9-year primary school actually introduced. This new type of school was divided into a children's level (years 1–6) and youth level (years 7–9). This was followed by the general education grammar school or the vocational school (Telhaug and Mediås 2003; Volckmar 2005, 2008). The aim of the new school was to develop an understanding for democratic principles through education (Volckmar 2005, 2008).

The failure of the nineteenth-century liberalism, the economic crisis of the interwar period, and the necessity for national reconstruction in the wake of World War II all contributed to public calls for a strong state. While individualism was promoted in the prewar period, a sense of community began to blossom post-1945: solidarity, cooperation, and national integration were seen as guarantors of peace, and the state was to provide for a policy of justified redistribution. The state was so dominant in advancing the concept of the single comprehensive school from 1945 to 1970 that Telhaug and Mediås (2003) called Norway an "interventionist school state."

36.1.2 Reform and Innovation

Between 1920 and 1930, experiments were conducted which ultimately created the basis for the 9-year primary school. It implied that the last 2 years of school would require differences in performance/achievement to be recognized at organization level. Educational psychological tests were used to assess and help forecast

cognitive abilities of learners and to classify the state of the learner's development (Slagstad 1998; Telhaug and Mediås 2003; Volckmar 2005).

In contrast, the student movement of the 1960s and the parallel leftist movement began to rebel against this. Noteworthy among this was the critical work of philosopher Hans Skjervheim who – as early as 1948 with his study “Objectivism and the Study of Man” – was a huge critic of applying natural scientific research methods on people. Skjervheim contended that people could not be reduced to the level of objects. His writings were particularly critical of the established educational teachings at university and of educational policy which was based in his opinion on a technical and instrumental view of the world, equivalent to a subject-object relationship and not a subject-subject relationship in dealings between teacher and pupils (Sørbø 2004).

This criticism of the economic-instrumental function of education led increasingly to the belief that education had value in itself and that pupils' experience and well-being were emphasized. In contrast to earlier variations, the curriculum for the 9-year primary school (*Mønsterplanen av 1974 (M 74)*) was developed and introduced as a framework plan. This allowed for local and individual adjustment to be made. Furthermore, the principle of organizational (external) differentiation was jettisoned in favor of educational (internal) differentiation. The 1987 review of the curriculum (*Mønsterplanen av 1987 (M 87)*) further weakened state control. The plan solely provided general guidelines; schools were now called upon to develop local school and working plans that took account of local circumstances and interests. School development was to be anchored locally.

During the 1970s and in particular the 1980s, opinion grew in Norwegian society arguing that in many respects the social democratic model of welfare no longer addressed current societal requirements and was no longer competitive when compared with other nations. It was contended that the welfare state sector was too comprehensive and took away people's freedom and responsibility for their own lives. This criticism emanated from developments in the western world granting greater leeway to market forces and individual freedom. In the education system the *Storting* introduced goal management as a political principle in 1991. The intention was to weaken detailed national regulations in favor of local school maintaining bodies which would then assume responsibility for the school (Slagstad 1998; Telhaug and Mediås 2003; Volckmar 2005).

Following the change of government in autumn 1990, reform efforts targeted a clear separation of responsibilities between universities and universities of applied sciences. The universities were to operate research and training in research, while universities of applied sciences were to be responsible for professional training. In a subsequent step, primary and secondary education was subject to reform, receiving a common curriculum with just one type of secondary school (*videregående skole*) differentiated into general and vocational programs. Parallel to this, pupils had the right to attend a 3-year secondary school that gave those who had completed vocational programs the opportunity to attend a university of applied sciences by completing a supplementary school year. Secondary schools were provided with a new curriculum in 1994 (*L94*), and entrance to primary school

was reduced from the age of 7 to 6, thus extending compulsory schooling to 10 years. Primary schools received their new curriculum in 1997 (*L97*) which defined more precisely than before what would be taught and when. The aim here was to provide common horizons of knowledge and culture. Moreover, Norway retained its restrictive position against admitting private schools, while in Sweden, alternative schooling has been available since 1993.

The aim of the reform policy was to create a knowledge-based school for a knowledge-based society. Critics argue that the reform has failed to meet its targets. At the end of the twentieth century, this was clearly reflected in OECD studies and reached the attention of the general public. The change of government in 2001 brought about a more neoliberal education policy that sought to open up the education system to market forces and corresponded more with the interests of the economy. The first major reform was carried out in the academic sector. Not only did the Quality Reform 2003 introduce a bachelor/master system earlier than other countries, it also formulated higher expectations on the intensity of learning and on the numbers of graduates. In the primary sector, local authorities became maintaining bodies for schools, thus enabling competition between local authorities and the schools themselves. However, people were only rarely given the chance to select a school of their choice freely. A national system of quality assurance based on national tests facilitated comparisons between schools and their quality. In order to be able to react flexibly to individual pupil differences in ability, the notion of classes was dissolved and replaced by small “base groups.” In 2003, private primary and secondary schools were permitted under law. As before, reform efforts aimed at increasing learners’ skills. Significantly, this reform was labeled Knowledge Promotion (*Kunnskapsløftet*). The new curriculum (*Læreplanverket for Kunnskapsløftet, L06*) was introduced in 2006 and consolidated the principle of integrating primary and secondary schools that had already begun. Although fundamental learning targets were defined at different levels, it was the responsibility of the individual school and/or teacher to decide just how the targets were to be achieved. This shifted responsibility still further towards local decision-making. The coalition government of 2005 largely continued this course of reform, but in 2007 again restricted the accreditation of private schools.

36.1.3 Political, Economic, and Cultural Framework of the Current Education System

Norway’s surface area measures 323,800 km² and its length from south to north is 2,500 km. Its topography is defined by a complex mountain system, and its coast is characterized by wild fjords. One-third of the country is north of the polar circle. As per 1 April 2013 Norway has a population of 5,063,709, and 50 % of which live in the conurbation area surrounding the capital Oslo. Roughly 12 % of the population are immigrants. All the major cities have been affected by

migration from the north and west of the country and from beyond the country. Immigrants come from Scandinavia (54,000), from Western Europe and North America (51,000), from Eastern Europe (80,000), and from Asia, Africa, and South America (230,000). Oslo has the largest proportion of immigrants (24 %) of all Norwegian counties and municipalities (Statistisk sentralbyrå 2013a). In addition, there are two national minorities in Norway: Sami (12,600) and Kven. Sami have their own parliament (*Sameting*) and enjoy autonomy in cultural affairs.

The Norwegian economy continues to be strong, and in 2011 the GNP per inhabitant was 86 % higher than average in EU. In February 2013 the unemployment rate was only 3.5 % (Statistisk sentralbyrå 2013a). Norway also has a highly developed system of welfare benefits (health insurance, pensions, etc.). In 2006, Norway spent 5 % of its GDP on primary and secondary education as a whole, whereas the OECD countries spent only 3.8 % on average (Norwegian Directorate for Education and Training 2012).

Norway is a parliamentary monarchy characterized by a democratic and consensus-based culture of government. The uppermost state body is the national assembly, the *Storting*. In addition the country is divided for administrative purposes into 19 counties (*fylke*) and 433 municipalities (*kommune*). At present (2013), Norway is governed by a coalition of conservative parties.

There is a broad consensus concerning goals and the necessary funding despite differences obvious between the parties on the details of education policy.

Schools in the country have to cope with the existence of two official standard languages: Bokmål (literally, book language) and New Norwegian (*nynorsk*). While New Norwegian reflects regional dialects, Bokmål is modeled on Danish. Both languages did not develop naturally; in fact, both were artificially created in the nineteenth century. Today, more than 85 % of all Norwegians use Bokmål Norwegian as their standard language. Numerous decrees have strengthened the position of New Norwegian. The municipalities themselves can decide which language they want children to learn first in school. Children of the Sami minority have the right to lessons in the Sami language. This is increasingly also the case for other minorities.

Parents are legally responsible for bringing up their children. Appropriate regulations ensure that schools provide children with an education in line with their capabilities and skills. This is to be a collaborative effort between schools and parents. However, the loss of the status of teachers in recent years has made these efforts more difficult. At present, this decrease in social status appears to be a direct consequence of the economic upturn in recent decades. In an effort to counter the shortage of teachers, accreditation criteria have been continually lowered in order to attract student enrolments at all to the profession. On top of this, teachers have often been made responsible for matters that go amiss in society. This low status is also reflected in teacher remuneration: while teachers in Denmark were paid 1.14 % of per capita GDP, Norwegian colleagues were paid just 0.74 % (OECD 2007).

36.2 Fundamentals, Organization, and Governance of the Education System

36.2.1 Current Educational Policy and Goals of the Education System

At the beginning of the twenty-first century, the Norwegian school system was marked by a series of shocks. The results of PISA surveys in 2000, 2003, and 2009 did not match Norway's own ideals and expectations in terms of the performance of its school system. This led to increased political attention for schools as a place of knowledge and learning, with quality and quality assurance becoming central concepts (see also Hopmann 2007). In this context, particular effort was made to instigate two reforms in education: *Kvalitetsreformen* (2003) and *Kunnskapsløftet* (2006).

The quality reform (*Kvalitetsreformen*) was Norway's reaction to the Bologna declaration, and it introduced the bachelor/master system of academic degrees. The declared goal of the reform was to improve the quality of education, to increase the international mobility of students and employees, and to raise the intensity and thereby increase the activities of students all in an effort to improve the ratio of graduates. The key aim of the *Kunnskapsløftet* reform was to improve the level of knowledge and practical skills of pupils. Influenced by international trends, particular focus is placed on the pupils' basic skills.

36.2.2 Legal Foundations of the Education System

The history of the Norwegian education system is characterized by strong state intervention and regulation aimed at unifying the various types of school and simplifying transition between them. The key acts of parliament in relation to education include the Law on Nursery Schools, the Law on Primary and Secondary Schools, the Law on Universities and Colleges, and the Law on Adult Education. From 2005 these were subject to administration by the Ministry of Science, even nursery schools which used to be under the governance of the Child and Family Ministry. Objections were raised with regard to extending the ministry competence. In particular there is the fear that such control would hinder higher education and research. In 2007, the ministry was divided into a ministry for school affairs and another ministry for higher education.

36.2.3 Governance of the Education System

The ministry has the overall responsibility for the supervision of education and tables laws and guidelines. Often a committee is established to elaborate a particular issue and to propose changes. For example, a quality committee was set up to develop concepts and ideas to improve primary and secondary education. The ministry also prepared a comprehensive report and a catalogue of measures to

present to a public investigation (St. meld.nr.30, 2003–2004, Kultur for læring). These were dealt with in the *Storting* and formed the basis for reforming the primary school and for the new curriculum (*Kunnskapsløftet*). Such a committee also draws on the specialist skills of recognized experts. The new curriculum comprises a common, general section that applies for primary and secondary education as well as for adult education. As mentioned above, the municipalities are responsible for implementing the curriculum at primary school, the counties for affairs at the secondary level.

In 1991, a new administrative principle in Norway's education system was introduced based on the notion of aims, but it was not until the turn of the millennium that these were put into effect in a series of comprehensive reforms. The detailed curricula of the 1990s (L94 and L97) only provided little leeway for delegating responsibility to schools. Only with the introduction of the new curriculum, L06 management was possible given the set of clearly formulated competence and skills aims. However, the curriculum did not provide any educational proposals on how these aims could be achieved. Maintaining bodies of schools are therefore being confronted with new didactic challenges. At present we cannot report on progress, except to say that problems have arisen. One can however assume that from an educational perspective maintaining bodies are not sufficiently prepared for their new tasks. A parallel national test system (*nasjonale prøver*) intends to assess whether aims have been achieved or not. Furthermore, publishing the results is intended to facilitate comparison between schools in terms of achievement and quality.

Both national and international organizations (NHO the Norwegian confederation of industry, EU, OECD, WTO, and the World Bank) are striving to gain increasing influence on shaping the education system. Another focal point for current education policy in Norway is the UN's declaration on human rights. As Norway is increasingly exposed to international competition, only a few attempts have been made to break through international development paradigms.

36.2.4 Funding the Education System

Norway's education system is largely funded by the public hand. Attendance at public education facilities (primary school, secondary school, university) is free. Each county and municipality independently determines how much funding for the corresponding schools comes from the state and how much from the county/municipality. This can lead to large differences in the setting of priorities depending on the financial situation of the counties/municipalities (Werler 2008). As the maintaining bodies of schools, the counties employ the teachers. The overall higher education sector is a national responsibility. To finance their studies, students can receive a grant and a student loan from the state. The distribution of such funds is subject to standardized criteria. Adults who have not attended secondary school have the right to catch up by attending school free of charge for a period of 3 years. Although this is financed by the state, counties and municipalities are responsible for the organization of the program.

36.2.5 Relationship Between the Public and Private Sectors in the Education System

There are only relatively few private schools in Norway. Since 2007, accreditation and funding have been regulated by the Law on Private Schools and the Law on State Subsidies for Private Primary and Secondary schools. In order to receive state support, private schools need to show that they offer a real alternative to public schools. This is the case, if they are religious schools, alternative education schools, or international schools. Secondary schools can be recognized as private schools if they promote elite sports, offer courses in Norwegian as a foreign language, or provide special needs education for young people with learning difficulties.

In 2011/2012, 2.7 % of all primary school pupils attended a school maintained privately (Statistisk sentralbyrå 2013b). About 86 % of all students at Norwegian universities and colleges took up an offer of public financial support in 2007/2008. Programs offered by the private BI Norwegian Business School were in most demand.

Besides formal adult qualifications that are mainly financed from public funds but privately organized and implemented, there are numerous other informal training and development programs. In 2005, about 86 % of all Norwegian companies carried out some kind of training program (Statistisk sentralbyrå 2013b).

36.2.6 Quality Management

As described above, the key aim of the *Kunnskapsløftet* reform is to improve the level of knowledge and practical skills of pupils. Influenced by international trends, particular focus is placed on the pupils' basic skills. In addition, the appropriate curriculum introduced skill aims for years 2, 4, 7, and 10 as well as for each school year in continuing education. It is striking how very similar the aims are to the requirements of the PISA study: pupils should be able to express themselves orally and in writing, read, perform mathematical tasks, and use digital tools. At the same time emphasis is placed on the principle that school is a place for everyone and that multifaceted learning process of pupils is to be secured by their democratic participation in lessons. In a bid to achieve this, lessons are to be adapted to the needs of the individual pupil.

A national evaluation system for primary and secondary schools was introduced in 2004. National tests were carried out in years 4, 7, 10, and 12, and results and information on the resources available in individual schools were published at www.skoleporten.no (Kunnskapsdepartementet 2004). Following the change of government and a critical review of applicable regulations, new rules for the national tests were defined in 2007. The new quality assurance system requires national tests to be carried out for years 5 and 8. Most importantly, they serve to provide teachers and maintaining bodies with information on the extent to which curriculum aims and objectives of individually adapted lessons have been achieved. The tests measure pupils' skills and knowledge in mathematics, Norwegian, and English.

The National Organization for Quality in Education (*NOKUT*) has been monitoring and regulating higher education since 2003, compiling accreditation rules for courses, and recognizing universities and internal programs to secure quality in higher education (see *NOKUT* and *NOKUT 2006*).

36.3 Overview of the Structure of the Education System

36.3.1 Preschool Education

In 2006, approximately 80 % of all Norwegian children aged between 1 and 5 years attended kindergartens (*barnehage*). The last government was endeavoring to extend preschool provision and was looking to achieve 100 % coverage within its term of office. This means that all children would be offered a place provided that the parents apply within defined deadlines. To assist the registration process, a web-based tool – the Kindergarten card – has been developed that graphically prepares developments and facilitates comparison. Nevertheless the government was intending to guarantee a place in kindergarten for all children from 2009. As a matter of fact, in 2011, the percentage of children aged between 1 and 5 in kindergarten was 89.7 on average (Statistisk sentralbyrå [2013b](#)).

About 55 % of all kindergartens are maintained privately, representing 46 % of all kindergarten places. To be able to cover outstanding demand in future, the government is actively calling on the support of private organizations in this sector. Approximately 9 % of all children between 1 and 5 years speak a language other than Norwegian. Of these, 54 % attend kindergarten (2005). At present efforts are being made to encourage the remaining families to send their children to kindergarten.

A framework plan has been regulating the educational content of kindergartens. In 2006 this was reformed by the competent Ministry of Science. The new plan has been coordinated with the curriculum of the school system and is based on the UN children's convention, the right of children to codetermination, and defines play and learning as aims of the kindergarten.

36.3.2 Primary School and Lower Secondary School (Grunnskolen)

This 10-year basic school is divided into a primary section (*barnetrinn*, years 1–7) and a lower secondary section (*ungdomstrinn*, years 8–10), which only means that the municipalities may separate premises if they wish. Since the beginning of the 1997/1998 school year, children begin school from the age of 6. School is compulsory for all children, and since 1975 educational policy has ensured that pupils with learning difficulties (physical and psychological) take part in normal school life. Lessons take account of the individual progress of each children, and it is not possible for pupils to repeat a school year. This principle of “adapted

education” is given particular support in the new curriculum (L06). Moreover, a minimum number of school lessons has been defined for primary and lower secondary pupils. Maintaining bodies can decide freely on the distribution of lessons across school years. Lessons are provided in Norwegian, mathematics, natural science, English, a second foreign language, social studies, art and crafts, music, nutrition and health, and sport. To strengthen the democratic culture, work on the school council is held to be an element of education. At present, the school’s education mandate is defined in a taxonomy of aims. This envisages a Christian education, with lessons in Christianity, religion, and life skills offered in each year of school. Specialist syllabi supplement the core curriculum.

School has an average of six 45-min lessons per day – the length of lessons may well be shorter in the first few years of school. Some schools are currently testing longer school days. All maintaining bodies are obliged to provide educational programs on leisure time (*skolefritidsordning*). This applies to the time before school (for years 1–4) and the time after school (for years 1–7). For this, county authorities may charge a financial contribution or transfer responsibility to private bodies.

36.3.3 Upper Secondary Education (Videregående Opplæring)

All young people have the right to attend an upper secondary school for 3 years. The lessons are taught in an upper secondary school (*videregående skole*) and follow either an academic or a vocational education program. The academic program is divided into general studies, sport and physical education, and art (music, dance, and drama). The nine vocational specializations are divided into construction and system technology, design and handicrafts, electro-technology, health and social matters, media and communication, agriculture, gastronomy and nutrition, service, and engineering and industrial production. The school has three separate years Vg 1, Vg 2, and Vg 3, with the first 2 years dedicated to general education and the third year vocational training. As mentioned above, curriculum L07 also applies to the upper secondary school. The school year consists of 38 weeks of between 30 and 35 lessons per week depending on the course.

36.3.4 Folk High Schools (Folkehøgskoler)

In Norway, “folk high schools” are an alternative and addition to public education. They originate from the Grundtvigian education tradition and aim to supplement to the regular education system, with the aim of nurturing “the whole person” (*folkeopplysning*). The schools are financially and politically independent and do not have any examinations at the end of courses. There are currently 80 such facilities in the country, and their programs are primarily aimed at young people

who have completed the upper level of secondary school and who need more time for fundamental decisions prior to continuing their education. In 2007, 6,000 pupils were following programs at folk high schools.

36.3.5 Tertiary Vocational Education (Fagskoleutdanning)

Tertiary vocational education builds on upper secondary education and provides vocational training that lasts between 6 months and 2 years. Programs are provided both by the counties and by private institutions, representing a real alternative to university study. Because the state accreditation organization (NOKUT) recognizes these programs, students are entitled to student loan from the state.

36.3.6 Higher Education (Høyere Utdanning)

In 2008, Norway had 7 universities, 27 university colleges, and 5 specialized universities institutions maintained by the state. Moreover, there are many private facilities, five of which receive state support. In the wake of the higher education reforms (*Kvalitetsreformen*) in 2003, all courses now follow the Bologna process and comprise 3-year bachelor and 2-year master programs. Some professional programs such as medicine and teacher training are currently exempt from this regulation. Higher education at state facilities is free of charge.

36.3.7 Adult Education (Voksenopplæring)

The competence reforms in the field of adult education defined framework conditions and cemented the importance of lifelong learning as a key principle of educational policy. The aim of the reform is to offer everyone the opportunity to enhance their competences and skills during their lifetime. Counties and municipalities have the task to develop and deliver programs related to the basic education of adults. Numerous study associations and courses are supplied by private providers.

36.4 Developments in the Current School System

36.4.1 Transfer Between School Years

Because Norway's long tradition of comprehensive schools does not recognize a distinction between primary and lower secondary education, transition problems are restricted to the transfer to the upper secondary school. On average, 96 % (2003) of a cohort attend the upper level of secondary education. Each county

is responsible for ensuring that its pupils are able to exercise their right to a secondary education. An advisory board (*oppfølgingstjeneste*) looks after those pupils who do not exercise their right and make no effort to do so.

36.4.2 Quality Development and Quality Assurance Measures in Schools

The Directorate for Education and Training (*Utdanningsdirektoratet*) was created to implement the Strategy Plan of the Ministry of Education, assuring quality assurance and equality for all types of school throughout the country. Primarily, quality assurance work is based on setting up an Internet portal (*skoleporten*) providing parents, pupils, and stakeholders with information for and on schools and their maintaining bodies. The portal provides information on learning outcomes (results of national examinations, grades for dissertations, etc.) and the learning environment based on an annual survey of pupils. In addition, many counties work together with national resource centers the Reading Center at the University of Stavanger, the Mathematics Center at the University of Trondheim, and the Center for Multicultural Learning at the University College in Oslo.

36.4.3 Dealing with Special Problems

The PISA and TIMSS studies of recent years (2003–2007) highlight three clear problem areas concerning Norwegian schools.

Since 2003 reports increasingly refer to the problem of noise and disturbance in classroom, seeing its causes in a lack of motivation and pressure to perform. Studies reveal a clear distinction to Sweden and Finland where lessons are conducted in a much quieter atmosphere. Recent evaluation reports invariably show lessons disrupted by numerous moments of irritation, a point that has been widely reported in the media. The latest state-financed studies have focused significantly on this issue. However nothing is being currently undertaken to counter the problem, except for initiatives instigated by some maintaining bodies. “Respect” – a program initiated by the Center for Behavioral Research at the University of Stavanger and some counties concerned about the problems of discipline, bullying, and concentration – is just one of these initiatives (*Senter for adferdsforskning*).

The PISA survey revealed that the performance of Norwegian pupils in reading was below the OECD average and that the spread of reading skills among pupils was strikingly high compared to other countries. Furthermore, reading skills varied from school to school, and girls performed significantly better than boys. This was not well received in Norway where equality of opportunity have dominated its educational policy since 1945. It also led to a debate on whether Norway’s school system actually favors girls and on whether lessons have been “feminized.” In addition, the dropout rate of boys from the education system is seen as a key problem. All these issues are much more evident in pupils from migrant families.

Since the reform of upper secondary education, not only do all pupils have the right to schooling at this level, they can also revise their decision once if they decide that the initial program is not suitable to them. Nevertheless, roughly 25 % of pupils fail to complete upper secondary school, and the dropout rate in the vocational program is more than twice as much (35 %) as in the academic program (15 %). This is highly correlated to the level of education of pupils' parents: the lower the level of parents' education, the more likely pupils are to drop out of the system. This trend is particularly prevalent among boys and children from migrant families. A parliamentary report highlighted that the early years of school were not particularly successful in supporting pupils with learning difficulties and children from migrant families. Furthermore, the report suggests that schools have tended to adopt a "wait-and-see" attitude (Storting Report No. 16, 2006–2007).

In an effort to avoid pupils failing at school, an educational-psychological advisory service has been established. The service is usually provided at both county and municipal level to be able to cover all age groups. Collaborative efforts between school, class tutors, and parents aim at developing suitable measures to reduce the learning difficulties of pupils affected. Pupils and their parents can have recourse to the service themselves, and head teachers can prompt the service to take action. This can include matters of organizational development, supervision, and the development of learning strategies and health care.

36.4.4 Measure to Integrate Pupils from Immigrant Families

The Education Act of 1998 stipulates that pupils from the Sami minority or pupils whose mother tongue is not Norwegian have the right to have lessons individually adapted to their linguistic needs either in Norwegian or in their mother tongue. On average, 2 % of all primary school pupils have lessons in their mother tongue. Since autumn 2007, new rules have been adopted for both options that encourage minority language pupils to be integrated as quickly as possible in normal Norwegian lessons. To promote this, the Ministry of Education has developed numerous training programs for teachers, educational aids, and evaluation instruments.

A significant step towards improving the service was taken in 2007 (Storting Report No.16, 2006–2007). Health stations that carry out regular health checks on babies and small children will now monitor the linguistic development of children, making appropriate suggestions for language training where applicable. Particular focus is being placed on practicing Norwegian in kindergarten, and programs are currently being developed to introduced language games and simulations in kindergartens for children from migrant families.

36.5 New Developments

In Norway, the Red-Green Coalition of the Labor Party, Socialist Left Party, and Center Party governed as a majority government from the 2005 general election

until 2013. It was responsible for developing the principle of Knowledge Promotion introduced in 2006. The overall aim of the Knowledge Promotion has been, and still is, to strengthen the school as a knowledge-based institution, and accordingly the quality assessment system implemented in 2004 has been continuously developed. Its key elements are national tests, international studies, user surveys, inspections, and the School Portal (*Skoleporten*). In addition a quality assessment system more specifically focused on vocational education and training is in progress. The political understanding of quality in education is closely linked to achievements on national tests, TIMSS, PIRLS, and PISA. In 2007 and 2011, Norway improved its results in TIMSS and PIRLS, and in PISA 2009 Norway performed better than previous years. Later political initiatives have concentrated on the improvement of the pupils' learning outcomes and on lowering the dropout rate in upper secondary education and training. In recent years, the Ministry of Education and Research has launched a series of white papers suggesting efforts for improvements in all levels of education, from kindergarten to primary and secondary education and training, higher education, and research. The quality of lower secondary education has been given specific attention. One important aspect has been to make education more practical and more varied and thereby more motivating and relevant.

Since 2010 new regulations for teacher education at all levels of school have been in place. They were also introduced for kindergarten teachers in 2012 and for higher education in 2013. Teachers preparing for teaching in primary and lower secondary now have to specialize in either years 1–7 or years 5–10. From 2013, teachers training for years 8–13 may take a 5-year program at university. The new curriculum regulations for teacher education at all levels emphasize the candidates' learning outcome and skills.

In 2013 the Norwegian Ministry of Education and Research published a report on the conditions for the Quality Reform, implemented in higher education in 2003, and announced further assessments of the reform and new efforts for a more competitive and flexible higher education.

The Education Act of 1998 (recently amended in May 2011) regulates primary and secondary education and training. The very first paragraph, the objectives of education and training (*Formålsparagrafen*), constitutes the overall purpose of education and serves as a framework and guideline for all other documents and activities. Since the first explicitly formulated common objective for education in the Education Act of 1848, this has been known as the Christian object clause, due to the traditionally strong relation between the state and Church and between the school and Church in Norway. Over the years, this has been a highly disputed topic, and finally, in 2009, new object clauses broke with this tradition. The new paragraphs are no longer referred to as the Christian object clauses, but rather as the value paragraphs, defining the value base for all activity in kindergarten and primary and secondary education and training.

There has been an almost astonishing degree of political consensus about the latest reforms in Norwegian education, both the Quality Reform in higher education and the Knowledge Promotion, covering all education in primary and secondary education and training. However, there are some topics that are subject for

important political lines of demarcation. In education the lines of demarcation refer particularly to topics such as private schools, ability grouping, and the amount of testing and publication of results.

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W. Hörner (✉)

University of Leipzig, Leipzig, Germany

I. Nowosad

University of Zielona Góra, Zielona Góra, Poland

37.1 History and Social Parameters of the Education System

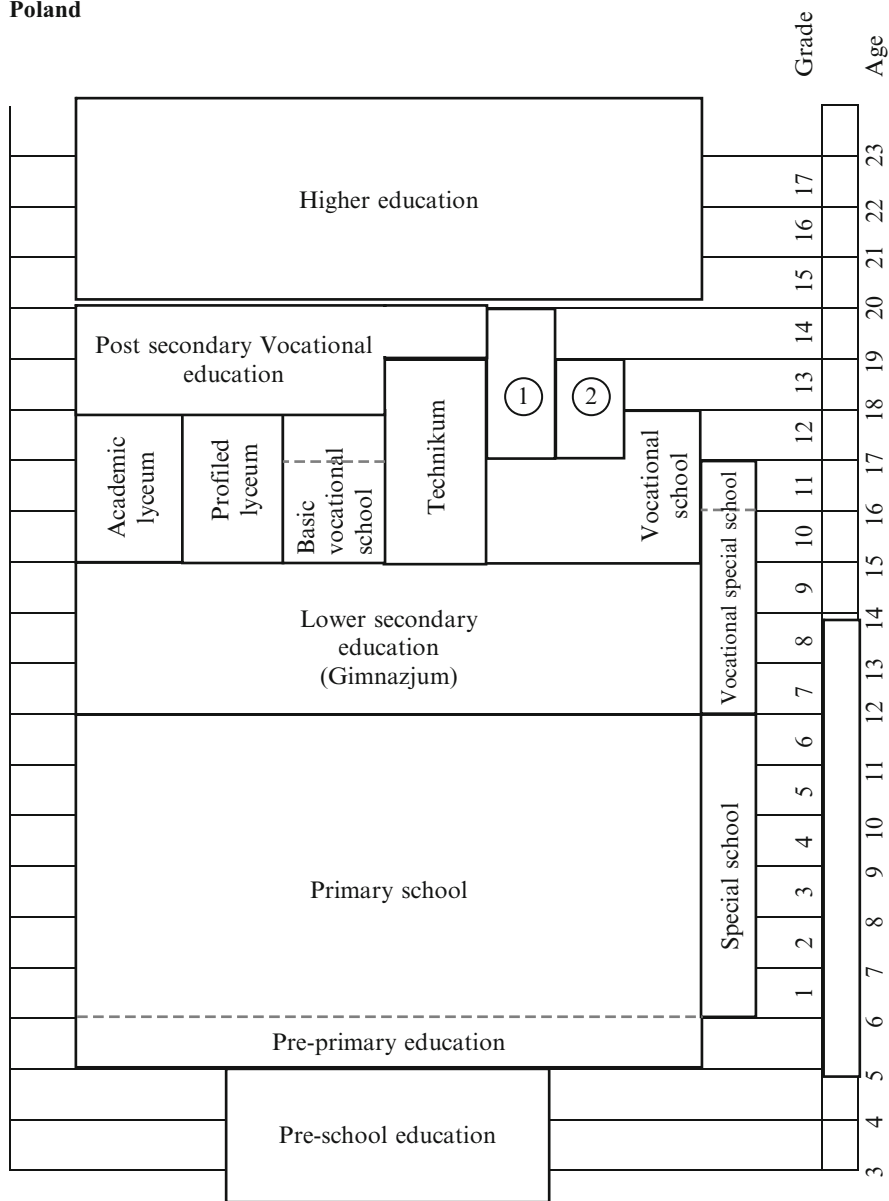
The social significance of school in Poland is closely linked with the historical consciousness of the Polish people following the painful loss of self-determination periodically and the ensuing struggle against the “foreign” occupying forces. This resistance movement was actively supported by the Catholic Church, even in the absence of an own national government. In fact, according to statistics, more than 93 % of the Polish population were official members of the Catholic Church in 2005. Education, often in the form of an underground school system, made a significant contribution to this process teaching Polish culture and language to the following generation in preference to the foreign culture imposed on the population by the occupying force (Bingen and Ruchniewicz 2009).

37.1.1 Cornerstones of Historical Development

Above all, Poland’s ideas on education were influenced by the West (see Anweiler 1996). The history of the Polish education system begins therefore with Christianization at the end of the tenth century. The Catholic Church established the first cathedral and monastic and parish schools, as it was the case in Western Europe too. Following the blossoming of Krakow University during the Renaissance (founded in 1364), Polish humanists hit upon the idea for the first time that the state should assume responsibility for the school system. In the sixteenth century, the golden age in Polish history, a large number of schools of different religious denominations were founded. However, only Jesuit schools survived the Counter-Reformation. The Age of Enlightenment gave rise to efforts in many sectors of society to spread the “light” of education (the Polish expression for education *oświata* contains an allusion to light – *światło*). The institutional climax was reached in 1773 when the Commission for National Education (*Komisja Edukacji Narodowej*) was established, which is regarded by the Polish people as the first modern Ministry of Education. The Commission devoted their attention to the expansion of the primary school system, a tiered school system and appropriate teacher training long before the educational plans of the French Revolution. However, the subsequent partitioning of Poland put a stop to their initial work.

Poland was partitioned for 120 years, during which time there was great tension between the partitioning powers on the one hand, which wanted the education system more or less to serve the purpose of a Russianization or a Germanization, and the “informal” education system on the other hand, which was either private or sponsored by tolerated associations and which was supposed to preserve the basis of Polish identity. In the period following 1918, educational policy was therefore strongly guided by the need to reunite the partitioned sectors, which were at different levels of development, not only socioeconomically, but also as regards literacy. On the other hand, the creation of a common school system was intended to help the divided territory to grow together.

Poland



- ① Complementary technikum
- ② Complementary upper secondary school

Since the occupational policy during World War II was intended to return the education system in the so-called Generalgouvernement (General Government) of Poland to an elementary level and to close all the Polish schools in those areas that had been integrated into the German Empire, the first task after the war was to build up the school system again, both materially and ideally. Above all, a solution had to be found for more than four million Poles at that time who could not read or write.

A milestone in the development of a school system was the Education Act of 5 July 1961, which introduced a common 8-year “primary school” leading to a selective 3-to-5-year vertically structured secondary school providing both academic and vocational qualifications. An attempt in the early 1970s to introduce compulsory education for a minimum of 10 years in line with other socialist countries failed on account of the rapidly worsening economic situation and deep-rooted social problems. What is remarkable about this attempt is the fact that the reform was not devised by party leaders, which was normal in socialist societies, but by an independent think tank that had kicked off its proceedings by giving a critical rundown of the Polish education system at that time (cf. Kupisiewicz 1991).

The period following 1989 was initially marked by economic restructuring and the social consequences of this, which included a relatively unstable political situation in the wake of frequently changing coalitions. These constant changes in the Polish government were of no benefit to the continuity and efficiency of the reform policy. This applies in particular to the educational policy as a result of the peculiarly tense situation arising on the one hand from the short, pragmatic steps taken to adapt to the changes in society and on the other hand from the far-reaching draft reforms, which were however only tentatively implemented by the Polish government in view of the transitory nature of their majority in parliament, a state of affairs that has existed up until recently. This meant that the Polish government only succeeded in implementing a rather cautious reform of the school system in the late 1990s.

37.1.2 Sociopolitical, Socioeconomic, and Sociocultural Parameters for Developing the Education System

It is noticeable during the era of the People’s Republic of Poland that, despite the implementation of the planned economy and an accelerated industrialization, the whole of the Polish society succeeded in distancing themselves from the Soviet Marxist-Leninist dogma to a higher degree than other states that came under the influence of the Soviet Union. Attempts to force to conform ideologically sensitive areas of Polish society, including education, by means of so-called ideological offensives failed miserably.

This contrast between a “monistic” state and a largely “pluralistic” society was partially responsible for the political crises that periodically occurred and led to the founding of the independent trade union *Solidarność* in the late 1970s. However, in the early 1980s, their activities were regarded as a threat to the socialist system by political leaders, albeit primarily in the wake of “external” pressure. Martial law,

i.e., a state of emergency, was imposed, and *Solidarność* was banned in an effort to avert a critical situation.

However, since these measures provided no solution to the sociopolitical and the accompanying economic crisis, and political leaders saw the *crypto-capitalistic* concepts as being a better remedy for the moribund socialist economic system (Kozakiewicz 1988), they were forced to recognize *Solidarność* as a partner again in the late 1980s, which – with tacit tolerance on the part of the new Soviet leader, Mikhail Gorbachev – eventually led to the first semi-free elections in 1989 and the creation of the first government in a Comecon state not led by a Communist. In other words, Poles see themselves as the instigators of the downfall of Communism in Europe.

Since the end of the 1970s, Poland's economy had been marked by a severe economic crisis, which manifested itself in an acute lack of supplies and which could only be improved by means of borrowing vast sums from abroad. Following the political upheaval in 1989, the structural economic crisis was overshadowed by frictions resulting from the transition from a planned economy to a market economy together with the crisis phenomena also observed in other postcommunist states: price hikes and high inflation, an increase in unemployment, the closure of uneconomical nationalized industries, and as a result a drop in production. Eventually the economy grew again, but only gradually at first. Inflation slowed down, which meant that the increase in prices at the time Poland joined the EU was only 1–3 %. The unemployment rate also dropped to the same level as in other European states (2005: 18 %).

Nowadays, Poland is a relatively homogenous nation state. There were a high percentage of non-Polish nationals living on Polish soil prior to World War II. However, official statistics do not give the exact figure today. Experts estimate that there are still today approximately 2.5 % non-Polish nationals residing within the borders of Poland. According to estimates, the German group is the largest (0.9 %) followed by the Belarusian and Ukrainian groups, each contributing approximately 0.5 %. The German minority are even represented by an MP in the Polish Parliament, the Sejm, following elections in 2007.

After World War II, Poland took the step from an agricultural to an industrial nation. In 1938, 70 % of the Polish population lived in the countryside, whereas in 2005, the figure was down to 38 %.

As in many former socialist societies, the teaching profession in Poland is on the one hand highly respected, but is on the other hand badly paid, which means that young, well-trained teachers often switch to other professions (e.g., in industry or tourism). However, slowly but surely, this discrepancy is being remedied by means of pay increases.

37.2 Fundamentals, Organization, and Governance of the Education System

37.2.1 General Principles, Current Educational Policy, and Goals

The basic legal principles of (public) education are codified in the Constitution of the Republic of Poland dating from the year 1997 as follows: Every person is

entitled to an education. The minimum school-leaving age is 18. Lessons at state schools are free of charge. Legislation may however allow state institutions of higher education under circumstances to charge a fee for providing certain educational services. Parents have the right to send their children to schools that are not state funded. Public authorities shall ensure that all citizens have universal and equal access to education. The autonomy of institutions of higher education shall be guaranteed. The most important ideals, principles, and goals of education and upbringing are also laid down in the preamble to the Education Act of 1991 (Hörner and Wompel 1994, p. 32). Education in the Republic of Poland is referred to as a “common good for all of society.” It takes into account not only the principles of the Constitution, but also the provisions of the Universal Declaration of Human Rights, the International Covenant on Civil Rights and Political Rights, and the International Convention on the Rights of the Child. The code of ethics based on Christian values constitutes an ideal basis for education and upbringing. Emphasis is on conveying the love of one’s country and respecting the Polish cultural heritage, while at the same taking into consideration the cultural values of Europe and the world. School should provide the necessary conditions to ensure that all pupils shall develop and be prepared to perform their family and civil duties in accordance with the principles of solidarity, democracy, tolerance, truthfulness, and liberty.

37.2.2 Basic Legal Principles

The basic legal principles of the Polish education system are laid down in three guidelines.

The Act on the education system of 7 September 1991 (with subsequent amendments) was the first piece of legislation following political change in Poland. It primarily redefined the relationship between state, society, and school from the point of view of de-ideologization and decentralization; it did not however change the existing structures of the school system.

The Act of 8 January 1999 (with subsequent amendments) introduced a structural reform of compulsory education and vocational education following long debates on educational policy. The time spent at primary school was reduced from 8 to 6 years, and instead nonselective, common secondary education, for a period of 3 years, was introduced in accordance with the Western European model (e.g., France). This meant that compulsory education was prolonged by 1 year. Furthermore, with the planned elimination of the dual qualification courses in the vocational education sector, the government virtually degraded all vocational courses leading to a qualification above skilled worker to the status of preparatory courses without a real vocational qualification. On account of massive resistance from within the Polish society to this passage, this section of the Act was amended in 2001, and the original dual qualification was reinstated.

The Act of 26 January 1982, the so-called Teachers Charta (with subsequent amendments) is one of the few statutory provisions that survived political upheaval

in Poland. The Act regulates teachers' relatively extensive rights and duties, which were hard earned in the 1980s, in particular a reduction in the workload.

The higher education system is regulated by their own legislation: the Act on Higher Education dating from 27 July 2005, the Act on Academic Degrees and Titles in the arts and sciences, and the Act on Universities of Applied Sciences dating from 26 June 1997.

37.2.3 Controlling the Education System

The education system is controlled at three levels – national, regional, and local. The education minister is responsible for controlling the education system at a *national level* and coordinates the state's central educational policy. The education minister collaborates on these tasks with the *voivode* (regional administrator). The minister's portfolio includes deciding on the following:

- The basic curriculum including scope and sequence for individual levels
- The lists of admissible textbooks and curricular materials
- The rules for assessing the performance pupils and deciding whether they can move up a class
- The minimum standards as a basis for class tests and exams
- The different forms of accountability of schools and educational institutions
- The rules and requirements for conducting innovative and experimental projects in the schools and educational institutions
- The requirements for staging school competitions

At the regional level (the *voivodeship* level), the pedagogical inspector is responsible for the education system. Although the regional pedagogical inspector is responsible for implementing the policies of the Ministry of Education governing at that time, he is not appointed by the minister, but by the *voivode*, who is also the person the regional pedagogical inspector has to report to. When implementing the educational policy, the pedagogical inspector collaborates with the regional self-governing organizations. His main tasks include supervising schools and institutions of further education from the pedagogical aspect, supporting schools with external examinations as well as organizing and coordinating in-service training for teachers.

The educational reform introduced in the 1999/2000 academic year intensified the decentralization process in the school system, commenced in the 1990s, and adapted the administration of the schools to the new regional structure. Nowadays, all the state schools and educational institutions are operated by the self-governing organizations (municipalities, districts, and *voivodeships*). The municipalities are responsible for opening and running state preschools (including special correctional preschools), primary schools, and schools of lower secondary education (not including special institutions). The districts are responsible for running all types of schools and institutions offering upper secondary education and further

education. The self-governing organizations in the *voivodeships* are responsible for operating regionally significant schools and educational institutions. The state institutions responsible for providing teachers with in-service training at a national level such as the CODN (*Centralny Ośrodek Doskonalenia Nauczycieli*) in Warsaw are accountable to the minister. Since 2006, the Minister of Science and Higher Education has been responsible for matters concerning science and higher education institutions.

37.2.4 Financing

The entire state education system is financed by the treasury. Whereas all the spending on education was financed directly by the treasury until 1990, the funding of preschools and primary schools subsequently became the responsibility of the municipalities. Since 1998, the percentage of the costs borne by local bodies has reached 70 %. This means that today expenditure on education accounts for most of the municipal budget, above all in agricultural areas. As a result of this, education even for the basic needs is underfunded, and, once staff costs (85 %) have been deducted, very little remains for investing in the infrastructure. However, since 1999, educational expenditure has been subsidized by the treasury at all three levels of regional self-administration in order to counteract the lack of funds. The state subsidies are based on a certain table, into which the actual number of pupils, the specific demands on the school (e.g., special training, integration schools), etc., are entered.

37.2.5 Relationship Between State and Private Ownership

There has been hardly any development in the tradition of independent schools in Poland since World War II. The first independently operated schools were established as so-called social schools in the late 1980s. The name “social school” was supposed to distinguish this type of school from the state school and at the same time emphasize the fact that it was not a private school. These schools are nonprofit organizations.

The independent schools can gain the status of a state school if they are prepared to adopt the standards imposed by the Education Ministry and employ qualified teachers. A grant is equivalent to 100 % of the running costs, calculated on the basis of a pupil in the same kind of state school.

In the 1989/1990 academic year, there were only 12 independent primary schools, and in the 2001/2002 academic year, there were already 1,603 including grammar schools and other secondary schools. In the past few years, this development has become stable in the case of independent schools for children and juveniles. In the 2006/2007 academic year, there were 2,290 recognized independent schools, and in the 2011/2012 academic year, there were only 1,900, a third of which were in the vocational sector (GUS 2012).

37.2.6 Quality Development and Assurance

In 1999, a system for ascertaining a pupil's performance externally was introduced as part of a structural reform. At the end of each academic level, assignments and examinations are planned and conducted by newly created institutions (district examining boards). The examining boards are obliged to provide the schools, the school boards (municipalities or districts), the regional pedagogical inspectors, and the minister with information on the results of the exams. The reports supplied by this board theoretically help to take appropriate measures to improve the quality of education and assess the educational policy.

The reason for supervising the quality of the teaching is to improve the education system. This primarily includes developing the quality of the schools, supporting the pupils' development, and providing the teachers with in-service training. In 2004, standards for measuring the quality of schools were laid down in a decree from the Education Ministry covering 16 areas including in particular the quality assurance system within a school, in-service training for teachers, work conditions in the schools, hygiene, assuring equal opportunities, work done by the school on upbringing and care, and the syllabus, organizing the educational process and the educational results.

The new rules require that the schools also constantly assess their own work by means of their internal quality assurance system. In other words, if possible, the school assesses to what extent their work is effective in all areas of responsibility.

The Inspectorate of Education is responsible for the pedagogical supervision of all the schools and staff (at the *voivodeship* level). The regional pedagogical inspectors carry out an external evaluation of the school's quality of work and on this basis write an overall report. They should use transparent methods for measuring quality and formulate their evaluations in such a way that they provide some support.

The introduction of a system for monitoring the performance of pupils externally brought about an important change in the Polish education system. An independent external evaluation (independent of school supervision, municipality, or school management) should ascertain whether the school and teachers are working in accordance with predetermined standards. The school curricula are also evaluated indirectly. Assignments and examinations for school leavers are organized by the district examining boards, and their work is monitored by the central examining board. Their responsibilities include:

- Devising proposals for standards, on which the assessment examinations are to be based
- Preparing examinations and tests
- Conducting assessment tests and examinations
- Analyzing the results of the examinations, formulating conclusions, and reporting and passing on this information to those parties interested
- Further training for examiners

The use of external and internal evaluation is intended to help compare school reports (both in Poland and abroad). This also makes it possible to diagnose the pupils better for the didactic purposes.

Teacher training takes place in two sectors of the education system: (a) in institutions of higher education and (b) in institutions below the higher education level. Teachers of *general knowledge subjects* are trained at universities and teacher training colleges as well as at sports and arts academies for the pertinent subjects. Teachers of *vocational subjects* are trained at special institutions of higher education, such as technical colleges, agricultural and technical colleges, and business schools. Teachers for preschools, primary schools, and social welfare institutions may participate in 3-year courses at teacher training colleges (i.e., institutions of postsecondary education, between the upper secondary education and higher education). The colleges collaborate though with the universities. In order to counteract the appreciable lack of foreign language teachers that still prevails particularly in the primary schools and vocational schools, a special form of training college for foreign language teachers was created. Approximately 80 % of teacher trainees are female.

The educational authority is legally bound to guarantee teachers access to in-service training. Conversely, teaching staff are required to attend in-service training courses throughout their career. The most important further education institutions include the Center for Teachers' Professional Progress, which was founded in 1992 and supervised by the Ministry of Education, and a network of method centers at the regional level. Practicing teachers work in these centers as specialist consultants and method advisors for all school subjects. At the *voivodeship* level, the regional pedagogical inspector is responsible for the in-service training of the teachers and for pedagogical supervision.

Head teachers are selected from the particularly well-qualified teachers by means of public tenders. There is no special training course for them. Their area of expertise is extremely wide as they not only have the pedagogical and legal supervision of the teachers in their school, they may employ and dismiss teachers.

Instead of individual curricula being developed centrally, the fundamental curriculum (*podstawa programowa*) has now been set as a framework at a national level. This compulsory framework includes the syllabus and the skills that should be acquired as a result at this certain stage of education. It should be the responsibility of the schools to devise the curricula. The teachers can write their own curricula, which could be of service to other schools once they have been approved by the ministry.

37.3 Overview of the Structure of the Education System

The 1999 reform in the educational structure completely reorganized the school system (see Eurydice 2008; Śliwerski 2004; Steier 2009). There was a complete reshuffle of the responsibilities shared between the self-governing organizations, which assumed the role of operator for schools and other educational institutions,

and the regional inspectors, who are now responsible for pedagogical supervision. The network of schools changed and new schools were founded, such as the 3-year lower secondary school already mentioned. On the other hand, the length of a training course in individual types of school was also changed, and compulsory education was extended from 8 to 9 years. In Poland, compulsory education lasts until the completion of the lower secondary school or until the age of 18.

37.3.1 Preprimary Education

Prior to 2014, children were able to attend preschools or preschool departments in primary schools between the ages of 3 and 6. Today, the maximum age for admission to preschool is 5 as a result of the school entrance age being lowered. Basic preschool services (5 h a day) for children are free of charge. Services beyond the basic level, such as meals, have to be paid for. The costs are set by the municipal council.

Preschool facilities are an integral part of the education system. They ensure professional care and prepare children for learning in a school setting. As of the age of 3, all children may attend state preschools depending on the number of places available. In special cases, younger children aged 2.5 may be admitted if the head of the preschool agrees. Priority is given to children who are either 5 years old or are being raised by a single mother (or father). The exact admission rules are contained in the Preschool Statute.

In most of the preschools, the children are grouped according to age. The number of children in a group must not exceed 25 with the exception of, firstly, integration preschools, where there are only 15–29 children including 3–5 disabled children, and, secondly, departments in special preschools, where there are 6–16 children, depending on the nature and gravity of the disability. In the 2005/2006 academic year, there were 122 integration preschools with a total of 590 departments.

Although the great benefit of preschools has often been emphasized since the 1970s for they are regarded as a requirement for equal educational opportunities, the increase in their numbers is even today far from being satisfactory. Approximately 66 % of the children in urban areas enjoy the benefit of attending preschool, while only about 30 % of the children in rural areas have this opportunity. Approximately 5.7 % of the children who go to preschool attend a private one. Recently, the number of preschools has unfortunately been decreasing, and this is largely due to economic reasons. Attempts are being made, especially in rural areas, to find solutions locally, for example, by means of offering shorter hours. In this way, small children's clubs and day-care centers have sprung up, and the founders of which collaborate with municipal foundations or social organizations.

By the 2003/2004 academic year, Year 0 form had become a free offer. Since 1 September 2004, it has been compulsory for 6-year-olds. Since the 2014 academic year, the compulsory school age has been 6. This means that a year of preprimary education is compulsory for 5-year-olds. The fundamental curriculum for preprimary education in kindergartens and preprimary departments of the primary schools covers four educational areas:

- Recognizing and understanding oneself
- Acquiring new abilities by means of actions
- Finding one's place in a peer group and society
- Creating a system of values

With the help of this very general basis, preschool teachers can devise their own programs containing goals, subjects, and comments on the appropriate methodology. At present, there are 25 approved programs available. The lessons in preschools are not divided into particular subjects. They have a global character, and the central activity still involves playing. Children's performance in preschool is not assessed.

37.3.2 Primary Education

Primary school in Poland is compulsory, and everyone should have access. This applies to 99 % of the Polish population. Until 2014, the school entrance age for children was 7. Today, compulsory education begins at the age of 6. Primary education lasts 6 years and ends with an external compulsory examination, which enables pupils to move on to a lower secondary school. All pupils can attend the state primary school free of charge. All the recognized independent schools have to comply with the same legal requirements as the state schools.

Since the number of children aged between 7 and 12 is falling, the number of primary schools is also dropping. In the 2011/2012 academic year, the drop was 1.1 % in comparison with 2010/2011. In the 2011/2012 academic year, 2.19 million children attended lessons at primary schools (a year-on-year drop of 0.2 %) (GUS 2012). The primary school plays an educational, nurturing, and social pedagogical role simultaneously and aims at a balanced physical, psychological, social, motoric, and intellectual development. It should give the pupils a comprehensive range of knowledge and, in this way, provide the basis for further general and vocational education. The syllabi in the primary school are based on three elements: the curriculum framework (*podstawa programowa*) set by the Ministry of Education, the individual (author) curricula, and the standards of competence. All the primary schools have to keep to the curriculum framework. However, the teachers are allowed to choose personal curricula based on a list approved by the Ministry of Education or even devise their own curricula and submit them for approval. In addition to this, there is also a list of textbooks approved by the Ministry.

The lessons for the 6 years in the primary school are divided into two phases – the *initial integrated lessons* in Years 1–3 and the *subject specific lessons* in the Years 4–6. In order to make the transition from preschool to primary school easier for the children, the introductory phase adopts a holistic approach with the lessons being taught by one individual teacher. The timetable comprises a total of 18 or 19 lessons per week plus five lessons when the head teacher speaks to classes.

In Year 4, the subject-specific lessons begin with science, technology, language, and social studies. In addition, so-called educational paths are introduced more or

less as a teaching principle, i.e., certain educational content that is not a subject in its own right, but should be included in existing subjects and is therefore taught by all the teachers. These are topics like health, ecology together with media and social education. The latter topic covers a wide range from the small circle of the family and the regional roots of the pupils to a patriotic and European education. The systematic teaching of specialist subjects includes the fundamental principles of the general knowledge subjects: native tongue, foreign language (as of Year 5), mathematics, social studies, history, geography, biology and hygiene, physics, chemistry, technology and elements of computer science, the fine arts, music, and sport. The curriculum is uniform; there is no differentiation as a result of optional subjects or facultative content. In the first 3 years, there is only a verbal evaluation of the overall performance of the pupils in accordance with the principle of integrative (not subject-based) education. As of Year 4, the teacher uses a six-mark scale for evaluations: 6 (very good) to 1 (insufficient). The conduct of the pupils is also evaluated: exemplary, very good, good, correct, disproportionate, and reproachable.

At the end of the primary school, the educational level of the pupils is ascertained by way of a compulsory external examination, which by no means is used for selection purposes, but simply provides the school and education system with information on whether the pupils have reached the predetermined level of ability.

37.3.3 Lower Level of Secondary Education

The *gimnazjum* (lower secondary school) has only existed as a new form of lower level secondary education in Poland since the 1999/2000 academic year. The *gimnazjum* is now also part of compulsory education in Poland. Pupils automatically move on to the *gimnazjum* (without any selection process), the only requirement being that a pupil has successfully completed Year 6 at a primary school. A pupil attends the *gimnazjum* for 3 years, this being the final stage of general compulsory education in Poland. The new type of school was given the task to structure the career guidance for young people more rationally by improving the effectiveness of their skill analysis and, by doing so, to counteract the criticism that the upper years of the primary school were inefficient. The structure of the curriculum at the *gimnazjum* is in line with the system at the primary school. The curriculum framework is compulsory, while the school and the teachers of the individual subjects are responsible for selecting and designing the syllabi. In addition to the compulsory subjects, which correspond to those subjects taught in the second stage of primary school, there are also “educational paths” which are not subjects in their own rights, but included in existing subjects. In addition to those subjects taught at primary school, pupils are given lessons on philosophical education, civil defense, and “Polish culture within the Mediterranean civilization,” a subject that serves the purpose of underlining Poland’s position in Western European culture. In order to keep to the educational concept, it is recommended that

schools create small modules. The head teacher is responsible for program implementation. Teachers of the individual subjects are responsible for presenting the content of the educational paths, which they have to incorporate into their lessons. The weekly number of compulsory and elective lessons together with religious instruction/ethics may not exceed 31 during the 3 years at the *gimnazjum*. At the end of the *gimnazjum*, there is an external examination, which pupils have to pass if they want to continue their education at the upper level of secondary education.

37.3.4 Special Schools

There are special educational measures for children and young people suffering from disabilities and abnormal development. These measures require special teaching methods and learning processes. Depending on the nature and gravity of the disability, this training can take place in regular schools, integration schools, or in integration departments at regular schools, in special schools, or special departments at regular schools or even in the form of individual tuition. The appropriate training is recommended by a special advisory service (psychologists, educationalists).

In Poland, 23,773 pupils attended special schools in 2011/2012 at all educational levels. In contrast, 58,529 pupils were admitted to the various types of integration schools already mentioned (GUS 2012). The goal of the educational policy is to improve integration. The percentage of pupils attending special schools for primary education was approximately 3 %, at the lower level of secondary education approximately 4 %.

37.3.5 Upper Level of Secondary Education

The upper level of secondary education subsequent to the *gimnazjum* is divided into the following types of schools:

- The 3-year, academic lyceum (*liceum ogólnokształcące*) leading to the *Matura* examinations
- The 3-year, “profiled” lyceum (*liceum profilowane*), which may also ultimately lead to the *Matura* examinations, but which rather gives young people a general career oriented education, the content being presented in 14 profiles
- The 4-year technical school, the students of which are awarded the university entrance certificate and a vocational qualification
- The 2-to-3-year basic vocational school, which enables students to gain a qualification as a skilled worker
- The 2-year supplementary, academic lyceum for graduates of the basic vocational school who wish to continue their education and obtain their *Matura* examinations

- The 3-year supplementary technical school for graduates of the basic vocational school, who wish to continue their education and acquire a vocational qualification in addition to the *Matura* examinations

An entrance examination is required in all school types leading to the *Matura* examinations. Students can attend the course leading to the qualification as a skilled worker not only at the basic vocational school (*szkoła zasadnicza*), but also by means of in-company training (in particular, but not only, for craftsmen). The strategic goal of the educational policy in the 1990s was to improve the level of education and training opportunities by means of raising the standard level of education to the *Matura* and admitting more people to institutions of higher education. The envisaged goal was to bring approximately 75 % of the youth up to *Matura* standard by 2010. This educational policy was given priority resulting in a restructuring of the qualification pyramid. Instead of the previous training foundations at the skilled worker level, which almost 50 % of the young people reached in 1990, a qualification at mid level is to be offered to the vast majority of young people in future. In connection with these plans, the three types of schools at the upper level of secondary education went through a restructuring process in terms of their quantitative significance. The 75 % were basically achieved at the turn of the century. While 45.6 % of the young people started basic vocational school in 1989/1990, this figure was down to 23 % in 2000. If the number of “dropouts” is taken into account, this means that 74 % of young people attended a school which prepared them for the *Matura* examinations in 2000. The percentage of girls alone was 83 %. Admission to schools at the upper level of secondary education depends on the score that each pupil is awarded at the *gimnazjum*, including the results of the school-leaving examination. The schools themselves finalize the precise recruitment details.

The academic lyceum prepares pupils for the *Matura* examination. Today, the preparatory course takes 3 years. The main goal is to enable students to study at a higher education institution. The curriculum at the academic lyceum has a wide range of compulsory subjects in the uniform segment of the school (Polish, two foreign languages, mathematics, social studies, history, geography, biology including hygiene and environmental protection, physics including astronomy, chemistry, technology including computer science, the fine arts and music, sport, military studies). At the same time, the educational process should be geared towards the pupils’ own interests. This takes place by means of special educational profiles and the inclusion of facultative content. There is facultative content in the area of philosophy and ethics, “the main problems of the contemporary world,” law, business, computer science, safeguarding and shaping the environment, pedagogy, and psychology.

The bilingual, academic lyceums, which hold lessons in two languages, are a new development in the wake of the political upheaval. The second language used in lessons besides Polish may be English, German, French, or Spanish. In 2003/2004, there were in Poland 29 lyceums with English, 24 with German, 8 with French, and 5 with Spanish as the second language used in lessons. The European

states in question usually support these schools by providing both material and staff. School leavers can acquire international diplomas giving details of their knowledge of the pertinent foreign language in addition to obtaining the Polish *Matura*. In 11 of these lyceums (with English as the second language in lessons), pupils can also take the *International Baccalaureate*.

Pupils at the academic lyceum can take the *Matura* examinations; however, they are not compulsory. It is also possible to leave the lyceum only with a school-leaving certificate. In total, 98.7 % of the school leavers from the academic lyceum successfully complete upper secondary education, while 94.1 % are awarded the *Matura*, which entitles them to apply for admission to an institution of higher education.

The *profiled lyceums* fill the gap between the academic and the vocational schools. In 3 years, students can obtain the university entrance certificate, just like the academic schools at the upper level of secondary education following the *gimnazjum*. The curriculum largely corresponds to the academic schools at the upper level of secondary education with the addition of the pertinent vocational profile content, which accounts for approximately four lessons a week. The comparatively small number of lessons per week shows that the vocational profile content is not intended to prepare the student for a vocational qualification, but it is rather a general preparation for the actual vocational training which is intended to take place in a post-lyceum training course. There are 15 different profiles according to statistics, with the highest demand being for trade and administration as well as computer science and business management. These schools alone account for 53 % of all pupils.

The vocational schools at the upper level of secondary education, where students can obtain a dual qualification, include the technical schools (*technikum*), the supplementary technical schools, and those schools of an equal ranking. Following the introduction of the *gimnazjum*, the courses at the technical schools last 4 years. At these schools, students can obtain a higher vocational qualification and an academic education, concluding with the *Matura*. In recent years, approximately 90 % of the students at these schools took the *Matura* examination, with approximately 78 % of these actually passing the examination and thus becoming entitled to study at an institution of higher education.

The basic vocational schools (*zadadnicza szkoła*) do not offer dual qualifications. Courses at such schools take 3 years and constitute the most important route to gain a qualification as a skilled worker. The basic model is that of a full-time, vocational training course at school; in addition, there is a company-supported training mode as part of the apprenticeship. In the basic vocational schools, students can acquire a qualification as a skilled worker (or trade journeyman) together with a general and vocational certificate of education, which allows students to attend a 3-year supplementary technical school (or a 2-year supplementary lyceum). In 2012, 74,989 students successfully completed the basic vocational school. In 1995, the figure was 215,200 (GUS 2012). What is conspicuous is that there are today more than twice as many young men as young women. Even when it comes to vocational training, young women aim to acquire higher qualifications.

Since 2005/2006, young people have shown more interest in schools which enable students to acquire directly vocational qualifications. The reason for this interest is most probably the current situation on the labor market, where well-trained technicians and qualified skilled workers have much better chances of gaining employment than a few years ago – and this applies not only to Poland, but also to other countries. In contrast, there has been a steady drop in the number of students attending the profiled lyceums, where only general training and basic vocational knowledge can be acquired.

37.3.6 Postsecondary Educational Institutions

A special feature of the Polish education system is the post-lyceum sector. There are two types of educational institutions. The post-lyceum vocational courses (*policealne studium zawodowe*) enable primarily school leavers from the academic lyceums to acquire vocational qualifications below the higher education level. In training courses lasting 2–2.5 years, they prepare technicians and similar professions at mid level in the economic, trade, service, administrative, media, social welfare, and medical sectors. The short training courses (1–1.5 years) leading to vocational qualifications at the level of skilled workers after the *Matura* examinations are less popular today. The post-lyceum training courses have been constantly expanding partially as a result of the increase in the number of independent educational institutions. The number of students grew between the 2000/2001 and 2011/2012 academic years from approximately 200,000–330,600. Approximately 54 % of these were women. In 2011/2012, schools in the private sector trained about 75 % of all post-lyceum students (GUS 2012). This sector has seen the largest growth in independent schools. In the light of this trend to privatization, it is understandable that the now defunct original reform plan to transfer vocational qualifications above the skilled worker level to the post-lyceum sector was seen by critics as an attempt to privatize the vocational qualification process in order to release the state from its educational duties.

37.3.7 Tertiary Education

In Poland, the tertiary education sector is divided into several institutions. In addition to the post-lyceum educational institutions, which are not included in the higher education sector, there are the universities of applied sciences (*wyższa szkoła zawodowa*), the universities and the technical colleges with the same legal status as the universities and the teacher training colleges and the foreign-language colleges established in the 1990s to meet the acute demand for foreign language teachers by offering 3-year courses. The academic ranking of an institution of higher education is based on whether it is allowed to offer Master's degree programs or not.

Since the political upheaval, there has been a remarkable quantitative and qualitative development in the Polish higher education sector (Steier-Jordan

1999a; Hörner 2002b). The new law on higher education in 1990 primarily gave institutions of higher education autonomy, i.e., independence from state administration, academic liberty, and new financing arrangements. Furthermore, the law allowed independent institutions of higher education to be founded. As a consequence, the number of students increased from 403,000 to 1.76 million and the number of institutions of higher education from 112 to 460 between 1990 and 2012 (GUS 2012). This expansion was only possible as a result of structural diversification (HRK 1991), on the one hand as a result of allowing private institutions of higher education and on the other hand as a result of introducing universities of applied sciences (*wyższe szkoły zawodowe*) (HRK 1997), which in turn brought about a diversification of courses (diversification of curricula, i.e., introduction of 3-year courses – the *licencjat*, today equivalent to a Bachelor's degree). This meant that 315 of the 460 institutions of higher education mentioned were privately operated. In 2012, almost one-third of all students were enrolled at private institutions of higher education. Since the tuition fees charged by these institutions are relatively high for Poland (US\$ 250–2,500 per academic year) especially considering the average income and currency fluctuations, then the importance higher education has in the Polish society can be estimated by the financial sacrifice necessary to acquire it.

Just how spectacular the expansion of the universities of applied sciences becomes apparent when the numbers of graduates are compared – the number of successful graduates grew from 16,800 in 2002/2003 to 497,500 9 years later (GUS 2012). Since the qualification that the student was awarded after 3 years (*licencjat*) was given the same status as the Bachelor's degree following the Bologna Process, the universities of applied sciences became even more attractive, just as in Germany, as institutional differences were evened out by means of aligning the curricula. Students with a Bachelor's degree from a university of applied sciences were then able to do a Master's degree program. The institutions of higher education (i.e., the universities), which used to offer a common *magister* program, have nearly all introduced the 2-stage courses of study (BA followed by MA).

The expansion of the higher education sector is stimulated by the increase in demand on the part of prospective employers for university degrees and by the corresponding interest from young people to improve their qualifications. However, the *Matura* examination is a necessary, but not sufficient, requirement for admission to an institution of higher education in Poland. Today, the individual institutions and universities set the requirements for admission themselves. In the state universities, there is as a rule, an entrance examination or some other form of selection (interview or *Matura* grades). In the independent institutions, there is usually no form of selection since tuition fees are charged, but some of them perform continuous assessment.

In 2001, a state accreditation commission (PKA) was established by the Ministry of Education in the wake of the Bologna process. Their responsibilities include inspecting and assessing the quality of the courses at the individual institutions and ensuring that university regulations are observed. They are also responsible for accrediting new institutions of higher education and courses of study.

37.3.8 Adult Education

The system of adult/further education is extremely diverse in Poland. Further education takes place on the one hand in a *school setting* (adult education system, second-chance education) and on the other hand in *out-of-school education*, i.e., in courses and other forms of training and finally in vocational training programs. Recently, the significance of privately and independently operated educational institutions has been growing. The regional and local job center retraining courses for the unemployed and/or workers threatened by unemployment initiated by the Department for Work and Pensions have to be seen as a special case. These courses are usually conducted by local private service providers, but financed from specially set up labor funds, to which all companies are required to contribute.

Since the adult education system (*szkolnictwo dla dorosłych*) has existed in Poland for decades, it is very well developed and comprises all the different stages and types of school from primary school to post-lyceum courses. Adult education is offered in full-time courses, night school courses, distance learning courses, and external courses. In 2011/2012, 286,000 students did courses at all the different types of schools for adults (except for post-lyceum schools), but this figure is already showing signs of a negative trend. The vast majority of schools for adults are state-run institutions; however, there are also private institutions primarily following *Matura* programs and (more seldom) as vocational schools of higher education.

The companies are neither legally obliged nor motivated by economic incentives to invest in staff training and further education. Staff training is part of in-house development strategy. At best, major companies with foreign capital, the banking and financial sectors and the management training sector, are more prepared to invest.

The Further Education Centers (*Centrum Kształcenia Ustawicznego, CKU*) create a bridge between adult education in a school setting and out of school. These are state-run institutions operated by regional pedagogical inspectors for the education system. The Further Education Centers offer not only academic education and further education in their courses, but also vocational qualifications and retraining. In addition, out-of-school education is a rich market for educational services, which are primarily provided by private organizations. The introduction of accreditation is a very important step towards ensuring the quality of education in individual institutions in view of the great diversity of educational service providers.

37.4 Developments in the Current School System

37.4.1 Transition from One Stage to the Next, Examinations, and School-Leaving Certificates

Since the current problem with the education policy, the quality and the quality assurance of lessons, has also become the focus of attention in Poland following the

PISA study, the issue of how to assess performance, particularly when pupils move on from one education level to another, is a problem that has not yet been solved. Evaluating pupil performance has two levels in the Polish system. On the one hand, there has always been internal, continuous assessment by the teachers in the school (with grades in the individual subjects), while, on the other hand, there is an external assessment in the form of final examinations organized by the regional examining board. Both parts of the evaluation should give information on the knowledge and capabilities of the pupils and help to optimize their progress. For this reason, the standard of knowledge is ascertained externally when pupils move on to a new education level, thus providing some assistance later in life after compulsory schooling when pupils have to choose between different types of schools at the upper level of secondary education.

At the end of the first stage of the primary school (Years 1–3), the children automatically move on to the next year provided that their performance is given an overall positive evaluation. At this stage, pupils rarely have to repeat a year since this depends on an examination by a psychologist and the approval of the parents. From Year 4 onwards, pupils are allowed to move on to the next year if the grades they have been awarded in the compulsory subjects are better than “insufficient.”

At the end of the primary school, all the pupils have to take a proficiency test. Although this test is not conducted for selection purposes, pupils are required to take it before changing to a lower secondary school. The results of this test are intended to provide information on the pupils’ performance compared with the requirements of the curriculum. There is no selection process conducted between the primary school and the lower level of secondary education.

At the end of the 3-year *gimnazjum*, the pupils have to sit an examination, the result of which appears on their school-leaving certificate together with their grades in the other subjects. This is intended to help the pupils to select their further education path. Since 2002, school leavers from the 3-year academic and profiled lyceums, the 4-year technical schools and the 2-year supplementary academic lyceums or the 3-year supplementary technical schools have been allowed to sit a central *Matura* examination if they want to apply for a place at an institution of higher education. After the transitional period expired in 2005, the new examination became compulsory for pupils at all academic lyceums and since 2006 for pupils at technical schools as well. The aim of introducing this new *Matura* examination was in the medium term to have it as a replacement for the entrance examinations used by the institutions of higher education. The criteria for examination requirements are devised by the central examining board. The examination focuses on the most telling subjects: Polish (native tongue), a foreign language and a further subject. If the entrance requirements set by the institution in question necessitate it, then the pupil can select further examination subjects in addition. All the examinations are held in writing. There are additional speaking tests for the foreign languages. Mathematics only became one of the compulsory *Matura* subjects in the 2009/2010 academic year.

37.4.2 Dealing with Problem Areas

Problems with violence in the schools and effective prevention have become an integral part of school life in recent years. Since 2002, all schools have been required to include preventive measures in their school programs. This preventive action is devised for the special needs of each school. How successfully a school implements these prophylactic measures is taken into account when the quality of that school's work is evaluated.

The treatment of children from migrant families in Poland has not been a serious problem until now. According to statistics, Poland is not an immigration country and until the mid-1990s actually witnessed a steady flow of emigrants, which only subsided after 1995. Now that the economic situation has improved, Poland has recently become the destination of illegal immigrants from Eastern Europe and Asia, a development which has not yet had any great impact on school. Moreover, the special educational requirements of the autochthon minorities have been taken more into account since 1990 thanks to the generous practice of setting up minority schools. As a result, the national awareness of the ethnic minorities is rising steadily. This is reflected in the teaching of the native language at all educational levels from preschool to the *Matura*. Consequently, the number of primary schools for the German minority has grown by a factor of 27, while the number of pupils has increased by a factor 19 since the founding of schools for national minorities between the 1992/1993 and 2006/2007 academic years. In comparison to the other national minorities, the schools with German as the native tongue constitute 36.1 % of all primary schools of this kind.

37.5 New Developments

In 2004, Poland became a member of the European Union. In light of this, the structural reform in 1999 was seen as a positive step in the direction of European integration. In fact, the new school model has a certain similarity with the structure of the compulsory education sector in France; however, Poland chose a 6 + 3 model instead of the French 5 + 4. The compulsory school reform seems to be a step towards alignment with the Western European models, and the similarity with the French model (instead of with the Scandinavian model, for instance) was certainly no coincidence (Hörner 2002a). A comparison of the vocational-technical education sector would also show that the philosophies behind the overall education systems in Poland and France have an inner relationship which goes far beyond the historical relations of the earlier centuries. The much improved performance in the 2003 PISA study compared with the results of the 2000 study can at least be regarded partially as proof of the success of the structural reform. Above all, the pupils in the random sample had been affected by the structural reform – most of the 15-year-olds were now still in the compulsory school and no longer subject to the system of selection at the lower level of secondary education. Therefore, the

conclusion was that a higher degree of integration at school had a positive effect on the pupils' performance.

However, one obstacle to integration in Europe in the education sector is the poor pay of the teachers, a fact that has a negative effect on teachers' motivation and slows down the impetus of the planned reform. Additional work, such as developing the curriculum, continues to be a problem since the teachers are forced to have several different sources of income to survive. Further problems identified by Polish education researchers arise from the current social turmoil. The PISA studies have shown that Poland has the lowest degree of social selectivity in the new post-socialist EU member states and is moreover the only country in transition that is performing better than the OECD average, a fact that is attributable to the (still) integrative compulsory school system, which in other states still has to compete with the old system of selection at the lower level of secondary education (Hörner 2009). Nevertheless, there are also signs of hidden social segregation in the Polish mechanism. As a result of the continued high unemployment rate, some underprivileged social groups are suffering in the wake of the implicit privatization measures taking place in the education system (Kowalska 2006). This can be most clearly seen in the preschool sector, but it is indirectly also apparent in the sector following the compulsory schools where the higher quality offered by the private education system can only be bought. Furthermore, even today the tradition of educational inequality still occurs in rural areas where the quality of the education is much lower than that in urban areas, and this difference is as considerable as ever (Wolk 2002). A solution will probably only be found when teachers in rural areas have the same working conditions as their colleagues in the towns and the cities and when the rural schools can offer the same facilities as the urban schools. However, this still seems to be a long way away.

Other positive trends in the Polish school system can be noted in the enhanced organization of early education and quality assurance in school-based work. In this context, three main areas were mentioned which are associated with the terms "knowledge and competence":

1. Even better access to education by means of:
Alternative forms of preschool education, equal opportunities for all pupils, better access to higher education, support for lifelong learning, and general education in computer science
2. Teaching values in the education system by means of:
Arousing public interest in education, developing and supporting European collaboration in the area of education, creating new behavioral patterns: entrepreneurial spirit, innovation, ecological awareness, and in-service training
3. Improving the quality of education by means of:
Raising the level of key skills; supporting education in the science subjects; developing and improving standards, programs, as well as training methods and conditions; improving the quality of career preparation for teachers in all types of school and for other pedagogical employees; and successful management of education, creating a new culture of quality evaluation, general support for learning

A higher quality of education will be additionally reinforced by the lowering of the age at which children will have to start their compulsory education. In accordance with applicable educational laws, all 6-year-olds will begin compulsory primary education starting in 2014/2015, which must be seen as an act of strengthening of the legislation adopted in 2004 which required mandatory preschool year for all 6-year-old children either at a preschool or at a preschool unit at school. Then, since 2009 the decision whether children should start at the age of 6 or 7 has been left to parental discretion. Accordingly, a document was issued recommending preparatory initiatives to particular schools and activities aimed at supporting the development of a younger child to pedagogical supervisory authorities.

Comprehensive, long-term, regional, and local education policies are being planned at the provincial level, constructed on thorough analyses (including population projections) and on a widely applied process of consultations. The act of determining long-term educational priorities at the level of local government should constitute a starting point. Moreover, they should be compatible with the priorities of the state. Unfortunately, the study conducted by the researchers at the University of Warsaw revealed that merely 22 % of municipalities and county towns had their separate strategic document related to education; in 47.9 % education was included in the overall developmental strategy, and in 29.6 % there were no strategic educational documents whatsoever. It is believed that strategic documents elaborated for this purpose should assist the local government in the implementation of difficult changes, such as rationalization of the school network (including closures and mergers), among others.

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J.M. Sousa (✉) • C.N. Fino
University of Madeira, Madeira, Portugal

38.1 History and Social Parameters of the Education System

38.1.1 Cornerstones of Historical Developments

The revolution of 1974 was a great milestone of political and social change with obvious consequences for the historical development of the education system in Portugal. Following the end of the nearly 50-year Salazar dictatorship (1968), the military overthrew the transition government under Marcello Caetano on 25 April 1974 and, having suffered heavy losses, ended the futile war in colonies in Africa in what became known as the carnation revolution. The national euphoria did not last long, however. The “three D’s” political program (*democracia, descolonização, desenvolvimento*), which promised democracy, decolonization, and development, covered over disputes within the armed forces movement (*movimento das forças armadas* – MFA). Some officers wanted a liberal democratic state, while others sought radical social transformations. Following six provisional governments, two presidents, right-wing and left-wing coups, three elections, social disquiet, and floods of Portuguese refugees escaping from ex-colonies at war, Portugal managed to establish democratic order and pass a new Constitution (1976).

The principles of education contained in the Constitution emphasize that everyone has the equal right to education, with the state being responsible for the democratization of education as well as for its ideological, political, and religious neutrality. In this context, education was seen as a means to “minimize economic, social, and cultural differences; to stimulate democratic participation in a free society; and to promote mutual understanding, tolerance, and a spirit of community.” A “new” education was to be provided for a “new” society. Article 74 of the Constitution obliged the state to implement these principles:

- To ensure compulsory and free basic education for all
- To institute a public system and develop the general system of preschool education
- To guarantee continuing education and to eliminate illiteracy
- To guarantee all citizens, in accordance with their ability, access to the highest levels of education, scientific research, and artistic creativity
- To provide for schools within the communities they serve and to coordinate education with economic, social, and cultural activities
- To promote and support access to education for citizens with disabilities and to support special education
- To protect and develop Portuguese sign language as a cultural expression and an instrument of access to both education and equality of opportunity
- To ensure instruction in the Portuguese language and access to Portuguese culture for the children of immigrants, thereby guaranteeing their right to education

Another historical cornerstone forming the basis of a number of changes to schooling was Portugal’s admission to the European Union on 1 January 1986.

Portugal

										Grade	Age
										17	23
										16	22
										15	21
										14	20
										13	19
										12	18
										11	17
										10	16
										9	15
										8	14
										7	13
										6	12
										5	11
										4	10
										3	9
										2	8
										1	7
											6
											5
											4
											3

Portugal has had to learn how to articulate its specificity within European diversity. Unity in diversity was another challenge, demanding cooperation with other peoples in Europe in a spirit of openness, tolerance, and solidarity. Although the EU does not decide what Portuguese pupils learn in school, it has a say in Portuguese educational and professional qualifications in terms of recognition by other EU countries, in access to learning opportunities at home and abroad, in partnerships and exchange

schemes, and in the removal of bureaucratic obstacles. Conditions placed on the government of Prime Minister Passos Coelho by the International Monetary Fund (IMF), the European Central Bank (ECB), and the European (EU) Commission in the wake of the financial crisis in 2011 when it was awarded financial assistance led to considerable cuts in state expenditure on the education system.

38.1.2 Educational Reforms in the Last 30 Years

A cornerstone of schooling that was already in place before the revolution of 1974 was the primary education reform of 1964 which extended the previous four years of compulsory education to six years. Later, in 1967, the first cycle of secondary school and the preparatory cycle of technical school were established. In 1973, basic education was divided into primary and preparatory (i.e., lower secondary) education, each of four years' duration, making a total of eight years of compulsory education. Upper secondary education was constituted by two cycles of two years each. This extended total school time by one academic year to twelve years. Despite the nominal pluralism and openness of the school system, the ideological indoctrination continued to exist through subjects such as the "political and administrative organization of the nation," "morals and religion," and "history and mother tongue" until the end of the dictatorship. Immediately after the revolution, through the law of 1974, all academic authorities up to and including head teachers were removed, and decisions were made by pupils, teachers, and auxiliary personnel in general assemblies after long hours of debate. Fundamental educational reform was discussed in associations, the media, and in the wider public. Ideological features were removed from the old programs, new educational programs were developed, and schools obtained the right to elect their own head teachers. A few optional subjects were introduced in secondary school. The Azores and Madeira autonomous regions received wider decision-making powers in educational affairs. The post-revolutionary phase of the transformation of education was typified by calls for community orientation, linking learning, and productive work; between school and university, an obligatory phase of community service was introduced in which young people carried out "socially useful" work. However, this socialist ideology was gradually opposed and removed from the Portuguese school system after a short period of time.

The Education System Act of 1986 established nine years of basic compulsory education and structured the school system into three cycles each of four years. In 1997, this act was amended, introducing uniform teacher training for all school forms, and thus brought to an end the schism between primary and secondary school teachers. All teachers now complete their training with the academic qualification of a *licenciatura* degree and, since 2005, a master's degree. For the first time, Portugal had a coherent national curriculum for all nine years of compulsory basic education that covered all subjects. Moreover, it afforded schools a

level of autonomy previously unknown, and schools responded to the different interests and needs arising from both regional and local characteristics and the individual idiosyncrasies of pupils. Other reforms took place in the areas of learning assessment, school management, the continuing professional development of teachers, and teacher education. A second amendment to the Education System Act passed in 2005 concerned the introduction of the Bologna Process in Portuguese higher education.

38.1.3 Socioeconomic Context of the School System

Basic education is free of charge, but fees are levied for school meals, transport, books, and materials with general support provided to needy pupils. In view of equal opportunities emphasized in the Education System Act, the literacy rate has fallen considerably, from 9 % in 2001 to 5.2 % in 2011 (male 7.5 %, female 12.9 %). Although part of the state education system preschool facilities charges fees and attendance is optional. The number of places available is lower than the number of applicants. It is thus probable that those with greater economic resources will be able to send their children to preschool education, with obvious consequences for their success in the following basic education. Access to universities or polytechnics is limited by *numerus clausus*. The socio-economic position of parents is also an influencing factor in determining access to higher education; this is especially so for access to private higher education institutions.

In terms of the level of schooling achieved, 37.8 % of the Portuguese population has completed primary education (four years); 18.8 % and 18.7 % have finished the second (six years) and the third (eight years) cycle of lower secondary education, respectively. Only 15.4 % of the population has completed upper secondary education, with just 8.9 % completing higher education. The number of early school leavers remains high still today; 46 % of young adults between 18 and 24 years old left school early. The European average is 21 % (Eurostat 2002). With all teachers in Portugal now having to obtain a university degree, the social status of teachers has been consolidated. The firm faith held in the integrity and ability of teachers as a profession was nearly in line with the European average (76 %). Starting salaries of Portuguese teachers are slightly below the OECD average; the salaries of more experienced teachers are considerably below the OECD average.

It was not until the introduction of the Education System Act in 1986 that the decentralization of the curriculum began, returning school to families and the community; parents have the right of choice and codetermination in education – choosing the children’s school and participating in parent associations and in educational and school boards. Parent associations have also been formed at local, regional, and national levels to exert influence in education and represent the rights and duties of parents.

38.2 Fundamentals, Organization, and Governance of the Education System

38.2.1 General Principles, Current Educational Policy, and Goals of the Education System

The education system has to fulfill individual as well as social goals. Both the Constitution and the Education System Act emphasize the right of all individuals to develop their personalities to the full and to have a personal vision of life and assert the esteem for different cultures. The education system should contribute to the development of society and provide cohesion; schools should foster the development of a democratic and pluralistic ethos and promote the free exchange of opinion and mutual respect; and education should enable each citizen to critically evaluate the society in which they live and to contribute to its development. Education should also help secure a national identity, convey the historical traditions of Portugal and its cultural heritage, maintain European and universal traditions, and foster a sense of solidarity among its peoples.

With the exception of some educational facilities, education in general is the sole responsibility of the Ministry of Education. The Ministry thus makes decisions with regard to the establishment and general organization of schools and the employment of staff and issues guidelines on the content of preschool education and on the curricula for basic and secondary education. Because of their political and administrative statutes, the autonomous regions of the Azores and Madeira have separate regional parliaments, ministries, and administrative bodies which – within the framework of the national law – act independently. Through the Institute of Employment and Vocational Training (IEFP) and in collaboration with social partners, the Ministry of Employment and Social Security is responsible for apprenticeships, centers of employment, and vocational training. It also has joint responsibility, with the Ministry of Education, for vocational schools and runs some preschool establishments. Certain responsibilities for vocational education are also held by the Ministry of Labour. Universities and polytechnics are largely autonomous and are monitored by the Ministry of Science, Technology and Higher Education.

38.2.2 Legal Foundations

The Education System Act (last amendment in 2005) forms the legal basis for the education system. Its provisions govern the organization and funding of the education system, individual educational support, the administration, development and evaluation of the education system, and the rights of private bodies and cooperation partners in education. It also comprises special education facilities, vocational education, distance learning, and the education of Portuguese citizens abroad.

Various decrees from 2007 to 2008 provide more specific details for the laws on education, teacher training, and higher education. These deal, for example, with training and enhancing teacher skills, recognizing university degrees obtained abroad, acquiring certificates during second chance education (through the New Opportunities Initiative), the rights and duties of pupils, and the participation of parents and municipalities in the administration of preschool facilities and in schools.

38.2.3 Structure of the Education System

The Portuguese school system consists of three four-year levels without any vertical differentiation in the primary and lower level of secondary education, while upper secondary education includes general and vocational schools. The tertiary level is made up of universities and polytechnics, and the fourth level comprises public, mainly non-state adult education, and continuing education facilities. Schools enjoy a certain degree of autonomy in the fields of curricula and lesson planning, internal administration, budget, and organization; the pedagogical work must be in harmony with the national curriculum. This envisages schools and classes putting its guidelines into concrete terms. Representatives of parent associations are involved in the design of national curricula and subject syllabi as part of the National Education Council. At school level, parent and pupil representatives are involved in school councils. Universities and polytechnics are autonomous; they decide on their own programs to meet regional and national needs.

38.2.4 Funding the Education System

In 2009, Portugal spent 5.79 % of its GDP on education; in the wake of the financial crisis, this fell dramatically to just 4 % in 2012. Public education is essentially financed by the Ministry of Education, although the financing of some institutions is shared with other ministries, especially in the field of vocational education. The Ministry finances central and regional services through the allocation of funds; it finances private and cooperative education by means of budgetary transfers. The bodies of the autonomous regions of the Azores and Madeira finance educational services and establishments through their own resources and state budgetary transfers. The municipalities are partly responsible for educational funding and expenses. They cover the construction, maintenance, equipment, and certain operational expenses of preschool education and elementary schools and provide complementary funding for school transport and extracurricular and leisure activities. Fees are levied for preschool institutions and in the private education sector. Portugal also receives funds from the EU's Programme of Educational Development for Portugal 1990 (PRODEP).

The program involves financing and resources within the fields of training, innovation, and the modernization of educational infrastructure.

38.2.5 The Relationship Between Public and Private Schooling

Private educational facilities are largely to be found in key cities close to the Spanish coastal regions. Supporters of private education draw attention to the inadequate quality of both infrastructure and teachers and to class sizes and the issue of violence in public schools. But private secondary schools are not only ranked in upper levels but also at the lowest levels of achievement performance tests.

38.2.6 Quality Management and Support Systems

The quality management on the system level is internally assured by a number of central service departments of the Ministry of Education, mainly the Department of Information and Evaluation of the Education System (GIASE). The external evaluation of pupils' performance is the task of the Department of Educational Evaluation (GAVE). Together with schools and the regional boards of education, GAVE provides the information necessary for the production of assessment instruments and is responsible for carrying out evaluations for primary and secondary school pupils. In addition, it supervises the evaluation and approval of textbooks and participates in international studies related to the assessment of pupils' learning processes. It prepares national exams at the level of secondary education and provides courses for teachers involved in the process of evaluation. The General Inspectorate of Education is responsible for the legal and educational supervision and monitoring of all educational establishments. With regard to public higher education, the inspectorate is also responsible for controlling compliance with legal provisions regarding fees and financial support for students. Finally, the inspectorate is responsible for monitoring the financial and administrative efficiency of the education system as a whole.

Teachers at the primary and secondary levels are judged on the basis of self-evaluation by a commission composed of colleagues from their own school who are designated by the pedagogic council. Self-report and comments provided by the commission are crucial to teachers' career development. The Law on Higher Education Evaluation (1994) prescribes the internal and external evaluation of higher education programs. With regard to the latter, commissions of experts carry out evaluation under the auspices of the National Commission of Higher Education Evaluation. In 2007, the Agency for Assessment and Accreditation of Higher Education was established which focuses on quality assurance and development. In an effort to increase its performance options, universities can also involve the evaluation program of the European University Association (EUA); in recent years, this was in fact deployed in over 20 proceedings.

38.3 Overview of the Structure of the Education System

38.3.1 Preschool Education

The preschool sector comprises four institutionalized child day care options: (1) kindergartens, administered by the Ministry of Education, for children between three and five years of age, which aim to develop the child's personality and provide care to help families; (2) social educational nursery schools that are under the mandate of the Ministry of Labour and Social Security which look after younger children after they have finished lessons; (3) special facilities which shall foster the development of five-year-olds in socially disadvantaged districts and regions and which are supervised by the Ministry of Employment; and (4) mobile care and support services for three- to five-year-olds which provide services in rural regions without kindergartens and which are mandated by the department of preschool education at the Ministry of Education.

38.3.2 Primary Education

Primary education comprises two cycles or levels: the first lasts four years and the second cycle two years. Subjects in the first cycle include reading and writing, basic notions of arithmetic, environmental studies, art, and sport; the second cycle covers Portuguese, a foreign language (English, French, or German), mathematics, natural sciences, history and local studies, art and technology, music, and sport. Ethics and religious education are offered as options in both cycles. Lessons in the first cycle are usually provided by a single teacher; in the second cycle, subjects are taught by specialist teachers. In 2005, reforms were initiated in the primary cycle which introduced English from year 1, strengthened teaching in the mother tongue and in mathematics, and brought about changes in assessing pupil achievement.

38.3.3 Lower Secondary Education

The lower level of secondary education (third cycle) covers the last three years of compulsory schooling. The curriculum covers Portuguese, a second obligatory foreign language (English, French, German, or Spanish), history and geography, art and other music classes, technology, sport, and an introduction into information and communication technology. Ethics and religious education are offered as an elective. In year 9, pupils take a uniform, nationwide examination in Portuguese and mathematics. These results make up 25 % of the final mark awarded to pupils in each of these subjects. The lower secondary (basic) education diploma (*diploma de ensino básico*) is awarded to pupils who successfully complete the lower level of secondary education and entitles pupils to proceed to upper secondary education. The level 2 vocational qualification diploma (*diploma de qualificação profissional de nível II*) also at the level of lower secondary education is awarded to pupils who

have completed a course in initial vocational training, or a level 2 vocational qualification course in a vocational school, or have qualified for a given occupation in second chance education. This certificate is awarded without pupils taking an examination.

38.3.4 Special Education Schools

According to the data supplied by the National Institute of Statistics, 12 % of Portuguese pupils have special education needs, but only 2.9 % receive assistance. While 79.6 % of the pupils receiving assistance are in integrated schooling, the remainder is in special schooling or is assisted through other types of support structure. By and large, pupils with hearing and visual impairments and with physical disabilities are educated and cared for in regular schools. However, the level of assistance provided for pupils with mental handicaps, learning disabilities, emotional disturbances, and multiple disabilities continues to be insufficient. There is a striking lack of qualified teaching staff, psychologists, and therapists working mainly in the field of integrated education and in special classes in regular schools.

38.3.5 Upper Secondary Education

The upper level of secondary education is optional and consists of a three-year general education and a vocational-technical education track. The national curriculum for the upper level of secondary education, whether public, private, or cooperative, seeks to achieve three aims: (1) to further develop and consolidate personal autonomy; (2) to enhance cognitive, methodological, and practical skills; and (3) to reinforce practical values and attitudes that will prepare young people to play their roles in society. Upper secondary schools are divided into two tracks: a general education track which prepares pupils who want to continue on to higher education and a technical-vocational track which prepares pupils to enter the labor market. General education offers programs in science and technology, social sciences and humanities, socioeconomics, foreign languages and literature, and fine arts. The technical track also offers general subjects such as Portuguese, foreign languages, or sport. However, their main programs are in the fields of engineering, electronics, IT, mechanical engineering, multimedia, administration, commerce, environment and spatial planning, social services, and sport. The possibility of changing between general and vocational tracks is restricted.

38.3.6 Post-Secondary, Non-tertiary Educational Facilities

A decree passed in 2006 attempts to provide a path into post-secondary education for young adults without an upper secondary qualification, for people over the age

of 23 with professional skills, and for the unemployed who already have either general or vocational school qualifications. These mainly technical specialist courses aim to ease access to work and take account of the needs of the labor market; they also entitle those who complete the courses to study at a university. Some vocational colleges, polytechnics, and universities are entitled to offer such courses (2008: 19 courses were offered by public universities, 205 by public polytechnics, 47 by private universities, and 24 by private polytechnics).

38.3.7 Higher Education

Higher education in Portugal is provided by public and private universities and polytechnics. In addition, there is the state-recognized catholic university established by decree of the Holy See. Private higher education institutions can only operate if they are recognized by the Ministry of Education. Access is regulated by the same procedures as those for state-run higher education institutions. Distance learning is provided by the state-run Open University. Universities and polytechnics are distinguished by their stronger focus on research or on professional orientation. Medicine, veterinary medicine, law, natural sciences, economics, and psychology are only offered at universities. Engineering sciences, management, education, agriculture, sport, and social sciences are offered at both forms of higher education. Courses in nursing, accounting, and medical technology are only offered at polytechnics. There are also higher education facilities for the police and the armed forces. Following the introduction of the Bologna Process, courses at universities and polytechnics lead to the award of bachelor and master degrees. Only universities are entitled to award doctorates. The postdoc qualification or *agregação* is required for the award of professorship. Teachers in preschool facilities and schools are required to hold a master's degree. Players in higher education are – besides the Ministry of Science and Higher Education – the Conference of Rectors, the Coordinating Council for Polytechnic Institutes, and the Coordinating Council for Private and Cooperative Higher Education.

38.3.8 Adult and Continuing Education

Colleges of further education allow students to obtain certificates of general and vocational education and open up access to higher education. The New Opportunities project aims to recognize, validate, and certify skills acquired in nonformal and informal learning and thus improves access opportunities to the labor market or to other educational courses. A wide variety of programs are offered under the auspices of this initiative. Given the high level of unemployment among young people compared to other European countries, these programs aim to improve the general and vocational education of young adults from the age of 15 or 18 years.

38.4 Developments in the Current School System

38.4.1 Transition Between Levels of Education

Primary schools assess pupil performance in the form of summative descriptions of achievement usually carried out every six months. Achievement at the lower level of secondary education is measured by marks awarded in each subject. At the end of year 9, the final examination combines internal and external assessments. External national examinations are held in Portuguese and mathematics and are conducted by the central services of the Ministry of Education. Pupils need to complete the lower level of secondary education before they can continue on to the upper level of secondary education. Pupils wishing to matriculate at the end of year 12 have to take a national central examination. Under certain circumstances, external candidates may also take the examination. Pupils following the technical track at upper secondary school receive a certificate of professional qualification level III, based on an assessment of achievement and professional competence. Admission to post-secondary and higher education programs requires pupils to have successfully completed upper secondary general education. Pupils can still gain access to higher education through second chance programs. Besides passing the nationwide examination, students also have to pass through an admission test conducted by each university. The number of places available for each individual university course is set by the Ministry of Education. Universities are entitled to determine their own admission requirements. Vacancies available after the General Board for Higher Education has allocated places are filled by means of a national competition.

38.4.2 Quality Assurance in the School System

External quality management in preschool and school education, administered by the General Inspectorate of Education (IGE), has the following responsibilities: (1) to supervise the care and education work in primary schools, (2) to implement national evaluations of secondary schools by means of questionnaires and standardized tests, (3) to inspect individual schools over a longer period of time with the aim of informing school management of the school's level of achievement, and (4) to evaluate non-state schools. The IGE is also responsible for carrying out investigative and disciplinary proceedings. As part of this, it draws on control instruments such as the annual activity plans, working reports, and the school's personnel reports. Evaluations and other reports identify the strengths and weaknesses of educational facilities and, at the same time, assess the extent to which recommendations have been met and deficiencies identified remedied. The new internal system of quality management is the responsibility of school staff and of representatives of the local municipality. The aim is to develop a willingness to reflect and report in order to foster a culture of quality in school.

38.4.3 Dealing with Special Problems

The Psychology and Orientation Service advises pupils in identifying problems and helps to overcome them. It also provides assistance in questions of training and career choice. Other support services also assist pupils and students from low-income families. The School Social Service, for example, is making sure that all young people have access to education that they attend school and that they obtain qualifications as far as possible. These services cover food services, accommodation, books and other school materials, health care, and scholarships. Beyond that, further educational services may be provided by second chance education facilities and further education colleges.

38.4.4 Measures to Integrate Pupils from Immigrant Families

About 9 % of the workforce in Portugal comes from abroad. Overall immigrants make up 4.5 % of the population. In 2007, an interministerial program to integrate immigrants was passed that comprised integration measures in the fields of labor market, residency, health care, and education. As far as education is concerned, the plan envisages a variety of measures including, in particular, cutting the number of early school leavers, improving vocational education, and intensifying the learning of Portuguese. In connection with this, precautions have been taken to ease the recognition of educational qualifications obtained abroad. The integration plan also envisages numerous school-related measures from teacher training, focusing on cultural diversity, and improved flows of information through to identifying, validating, and certifying nonformal and informal skills of immigrants.

38.5 New Developments

The financial crisis hits Portugal with all severity in a phase in which various measures had been introduced to raise the level of education in the country. These measures included the reform of teacher training, introduced in 2008. In implementing the Bologna Process, the structure of teacher training was standardized, and a law prescribed guidelines for the content, the number of credit points, and for obtaining a master's degree for all preschool and school teachers. At the same time, two categories of teacher were defined. Teachers were to be allocated to one of these categories based on the results of performance reviews during their careers. This plan led to mass protests by teachers. The financial crisis in the same year led to a collapse in the resources available to education; public sector salaries, including those of teachers, were reduced by 5 %; holiday and Christmas bonuses were cut; the working week was extended from 35 to 40 h; and the retirement age raised to 66 years. Parts of the school curriculum were dispensed, and by increasing the number of pupils per class, the number of teachers was reduced. As a consequence, there were strikes and examinations were boycotted.

Frustration rose among teachers when following the disappointing results of the 2006 PISA study which showed that Portuguese pupils scored below average in tests of reading competence (472 points), in mathematics (466), and in natural sciences (474). Results in the 2009 PISA study showed that the performance in reading competence actually rose to 489 points. Universities and other higher education facilities are also suffering from the austerity package drawn up by the troika of IMF, ECB, and EU Commission in 2011, with an increase in tuition fees as consequence. The number of students has since fallen, especially at private universities. Presently, two virtually irreconcilable trends can be observed in the Portuguese education system: on the one hand, the policy currently pursued of cutting expenditure and, on the other hand, the aim of leading to the country to peak of European performance.

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The chapter below reflects developments up to 2010.

L. Dumbrăveanu (✉)

National Institute of Educational Research, Bucharest, Romania

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39.1 History and Social Parameters of the Education System

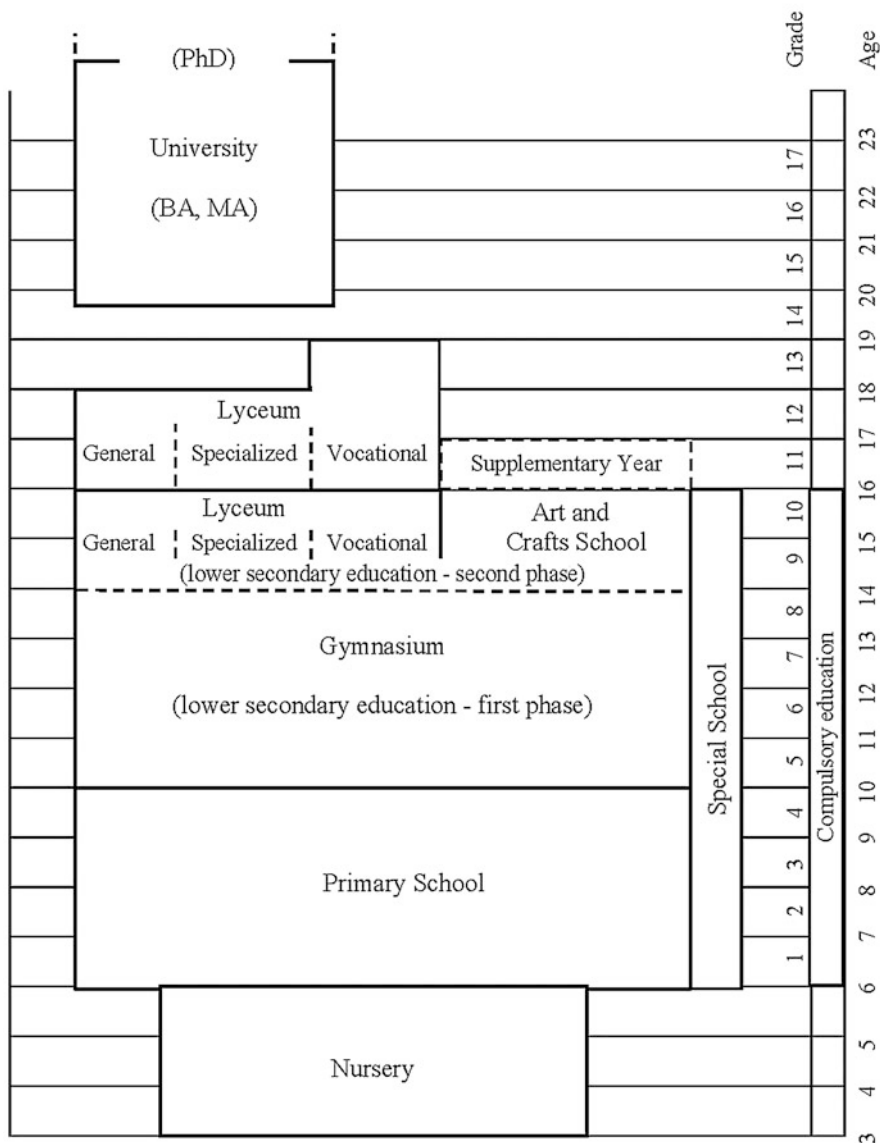
39.1.1 Cornerstones of Historical Developments

As in most countries, the development of the Romanian education system is related to the evolution of the political, economic, and social sectors of public life. From a historical point of view, the education system in Romania – its curriculum, structure, and organization – has been determined by a few moments of national importance.

The period prior to 1800 is characterized by a restricted, fragmented educational opportunity. Formal schooling took place in monasteries, and there were the first rudimentary forms of secular school education. The phase covering the founding of the country in the nineteenth century is marked by a growing interest in education and a time in which the school system was successively built up. Since then, each period is characterized by its own ideology, which formed the Romanian Constitution, the country's laws, and every sector of public life. Between 1864 and 1898, compulsory education was aimed to provide all children with elementary intellectual abilities, especially in reading and writing, to communicate important social principles based on morality, citizenship, and national values. From 1898, new national and international tendencies, such as the extension of compulsory education, the emergence and development of the new trades, the development of sciences and industry, and especially the great union of the country in 1918, informed the development of vocational education and contributed to the upward social mobility of academically successful pupils. Secondary education was also reformed. After 7 years of compulsory education, pupils could continue their education, which was divided into three tracks: humanities, sciences, and a vocational track which included specializations in agriculture, trade, and handicrafts (Bunescu 2004).

The period following the First World War is characterized by a challenge of integrating various systems and of creating a single, larger nation. Following the Second World War and a brief parliamentary phase under King Mihai, the ensuing decades mark a path of communism along Soviet lines. In the education sector, a number of important changes took place: the generalization of schooling, the extension of compulsory education, and the development of the entire educational process in public schools, controlled by the state. The Education Act of 1948 reduced compulsory education to four school years and generalized it. Later, between 1968 and 1978, compulsory education was extended to eight and then ten school years. The teaching of religion in schools was prohibited, and new subjects were introduced within the school curricula. The new communist ideology

Romania



was promoted within the society through the education system. The curricula of the universities were centralized and homogenized. Postsecondary and higher education were no longer subject to fees. In the 1990s, the fall of communism brought about change throughout Eastern Europe which also had a significant impact on the

education system. At the beginning of the 1990s, there was a lack of democratically determined political action. A new constitution was adopted in 1991 (revised in 2004) and an entire group of laws was derived from it. Even so, since 1990 the majority of Romanians still see the state as carrying primary responsibility for the organization, administration, and control of public life. This is a consequence of people's education before 1989.

39.1.2 Reforms and Innovations of the Last 30 Years

From the 1960s, when Nicolae Ceaușescu was the Head of State, Romania's Communist Government began to assert some independence from the Soviet Union. The dictatorship of the Ceaușescu family generated distortions in the economy, the degradation of Romanian social and moral life, and increased isolation from the international community. The dramatic decline in the standard of living in Romania and the acceleration of the social crisis were the results of the Ceaușescus' predilection for monumental building projects. Reform and innovations in the educational sector were influenced by the following factors: the system was oversized and possessed limited resources, there was a lack of alternative and intercultural education, there was excessive centralization and manifestation of political propaganda in the schools, and the emphasis was on paramilitary training, homogeneity, and the suppression of autonomy and individuality.

The revolution of 1989 opened up real opportunities for a fundamental change to the Romanian education system. With a phase of social reconstruction, the privatization of industry, agriculture, transport and public services, and socioeconomic reform had taken hold, providing key impetus for all other social areas and reform projects. With regard to educational reform, Bîrzea and Fartușnic (2003) have distinguished four distinct phases: deconstruction, stabilization, transformation, and coordination.

In the *deconstruction* phase (1990–1991), the process of correction measures began, and compulsory education was reduced from 10 to 8 years. This change brought about a number of innovations, such as discarding polytechnic education as the foundation of educational policies, ensuring university autonomy, limiting class size to 36 pupils per class, decreasing the teaching load to 18 classes per week in urban areas and to 16 classes per week in rural areas, and guaranteeing education in the languages of ethnic minorities. Since 1990 the state has recognized both private schools and religious education, both of which are partly financed through the Ministry of Education, Research and Youth (*Ministerul Educației, Cercetării și Tineretului* – hereinafter: Ministry of Education) provided they comply with its guidelines.

In the *stabilization* phase (1991–1992), the main trend focused on implementing the modernization of educational policies. The most important issues which appeared at the end of this second stage included: the absence of a coherent structure in the Romanian system, a lack of knowledge of reform alternatives, limited competence in managing change, the continuation of the highly centralized decision-making process, crisis in the in-service teacher training program, and the Ministry's inability to mobilize educators to support the reform efforts.

The *transformation* phase (1993–1996) was characterized by the implementation of structural reforms. The first national education policy documents were prepared.¹ During this period, important problems were tackled for the first time: the issue of the quality of education was debated, and the questions of financing and infrastructure received in-depth analysis and were included in a comprehensive program.

In the *coordination* phase (1997–2000), structural changes aimed at systemic reform were introduced. The main points of the World Bank's comprehensive reform initiative have begun to be implemented: the development of infrastructure necessary for linking institutions to national and international communication systems, the decentralization of school and university management, greater institutional autonomy, progress toward a global financing system, the redefinition of the central functions of higher education, and the establishment of joint curriculum and research units based on performance and operational compatibility criteria.² In brief, the main areas affected by reform and innovation in education were the legal framework; the organization, structure, and management of the education system; curricular policies; content and both teaching and learning strategies; and the objectives and main features of current and future reform initiatives. Generally speaking, educational reform was an extremely problematic process, characterized by contradictions, regressive tendencies, and a lack of real political support.

The *stagnation phase* (2000–2004) was marked by the ever slower pace of reform in providing alternative textbooks. New regulations were introduced without prior underlying research being conducted; regulations on decentralization were introduced that commenced with school funding, but even here the scientific base and consistency were missing.

The *phase of affiliation with the European Union* and steps taken toward internationalization (2004 to present) promoted serious research work that would accompany change to the education system. The results of international comparative studies (PISA 2006; PIRLS 2006; TIMMS 2007) were taken into account in the development of new regulations and changes to subject syllabi. The financial funding of reform measures in education was increased, and important regulations governing teacher salaries were made as part of the decentralization process, even if these were not an unconditional success. The key characteristic of this phase comprised the passing and implementation of a national decentralization strategy.

The right to a cultural and linguistic heritage anchored in the constitution and updated in 2004 guarantees that ethnic minorities can be taught in their mother tongue in some subjects, school units, classes, or other learning groups.

¹The main educational policy documents were Education Reform in Romania, drafted by an expert team from the Institute for Educational Sciences (1993); Higher Education Reform in Romania, prepared by the Consultative Group for Higher Education and Research (1994); and The White Book of the Reform of Education in Romania, published by the Ministry of National Education (1995). All these documents are retrievable from www.edu.ro and www.ise.ro.

²All the data presented above is drawn from the Education Act No. 84 from 1995 and other national decrees.

39.1.3 Political, Economic, and Cultural Conditions of the Education System

Although at the beginning of the 1990s the aim of the economic reforms was to establish a market economy by reducing the role of the state and stimulating private initiative, a series of delays and hesitations affected both the economy and institutional and legislative reform. The main factors determining this situation were an excessive concentration on political confrontations, the division of the political parties, and a number of unfavorable external circumstances. The passive-reactive character of labor market measures and delays in measures concerning reintegration and professional retraining were clear for all to see. In fact, there is a certain asymmetry between social policies and other programs for the reintegration and professional retraining that are often poorly financed, uncoordinated, and out of step with the existing requirements of the labor market and the significant changes that have taken place in the Romanian economy in recent years. Unemployment has fallen to around 6 % and has become stable at this rate. Roughly 20 % of the population earns a minimum wage of 180 € per month. Since November 2003, the Romanian economy can be described as a market economy, and economic growth of 7.5 % in 2008 was the highest rate since 1989. Unfortunately, this upturn has not yet been reflected in the social structure. A particular success is that after years of transition, Romania can be described today as a state founded on the rule of law which separates the powers of state and is based on political pluralism, on human rights, and on an increasingly active civil society.

Another key aspect in the country's development is the stark difference between rural and urban schools where daily life and conditions vary enormously. Intake at urban schools is between 100 and 200 pupils; there are well-equipped labs for natural science subjects, computer rooms, and clubs where children can meet after school to pursue their interests (e.g., in mathematics, film, and theater). There are also assistants, teachers, advisors, and programs to support gifted children. In contrast, schools in the country are often small, often comprising just four classes and children often have to be transported to a neighboring town for their secondary education. Since 2003 there is a transport service in rural areas that is constantly being developed ("the yellow bus with the little bell" – Microbuzul Școlar Galben cu Clopoțel). The state also funds half of the costs of commuting by public transport, such as rail journeys.

Significant steps have been taken to provide ethnic minorities with school education in Romania. In areas in which a linguistically defined ethnic minority makes up 10 % of the population or more, lessons are provided free of charge; some classes are taught in this language, and the language and literature of the relevant ethnic minority is the main language of instruction – even if Romanian is still obligatory. Depending on the proportion of the population, there are classes or even schools for the following minorities: Hungarian, G, Roma, Polish, Ukrainian, Serbian, Greek, Bulgarian, Czech, Turkish, Hebrew, Slovak, and Russian (Statistical Yearbook 2008).

At the beginning of the 1990s, religious education was introduced amid controversy. However, the Ministry of Education and the Ministry for Cultural and Religious Affairs are of the opinion that this not only benefits people hindered for decades from expressing their belief but that it is also a free expression of religious belief. This step can be seen as a good start, but other steps are needed to establish truly good religious education.

39.1.4 Social Status of the Teaching Profession

Because of numerous legislative and institutional changes related to the accession of Romania to the European Union, on the one hand, and low salaries, on the other, the teaching profession is not a very popular career choice among young people. Nevertheless, the number of qualified teachers increased in the years 2004–2008. This is an effect of national legislative measures such as the participation of teaching staff in the decision-making process and several national projects offering support to teachers working in education units in socially and economically disadvantaged areas. In addition, there is a National Centre for the Training of Teachers, laws on in-service training, and a law (from 2001) that codifies all the rights and duties of teachers.

39.1.5 School and the Role of the Family

After 1989, the involvement of families in school life in Romania increased substantially, along with their role in defining and controlling both pupils' timetables and the quality of the training and education provided by the school. Parents are now invited to cooperate with schools through discussion with teachers and school advisors in counseling and guidance sessions, which help pupils to choose their educational and vocational careers: theoretical, vocational, or professional upper secondary school, vocational school, or the labor market. To intensify the relations between families and the school, the Education Act of 1995 provides for a whole range of service including measures to identify speech deficiencies and to assist families in choosing a remedial program, which is carried out in kindergartens or in specialized centers. Psychomotor and language skills development is also monitored through specific evaluation tests carried out by teachers' school hygiene labs. Furthermore, the County Centres for Psycho-Pedagogical Assistance have competencies in educational guidance and in assisting teachers and parents to ensure the proper development of children. According to the present legislation, parents have the right to choose which school their children attend at the beginning of schooling and which modern language they learn (especially when the children are in primary education). Another important step in the inclusion of parents takes place at school level, where parents are required to nominate one of their member as a representative on the management board of each school.

39.2 Fundamentals, Organization, and Governance of the Education System

39.2.1 Educational Aims and the General Function of the School

The key fundamental principles that determine present-day education policy include: ensuring lifelong access to education, securing equality of opportunity in education based on individual need and the highest possible participation in the education system, providing high-quality education in respect to methods and strategies in lessons and its evaluation, securing high standards of teacher professionalism and school administration, providing high-quality content and knowledge of key trends and challenges in curriculum development, strengthening political dialogue, developing partnerships, and encouraging the participation of society at large in change processes in education. These principles were developed in concordance with targeted personality profiles of school leavers in the Education Act of 1995, revised in 1999 and 2003. The latest report on the status of the Romanian education system published in 2008 (*Raport privind starea invatamantului*) names further strategic aims to be implemented in the coming years: to develop the school infrastructure, particularly in rural areas, to promote access to information technology for all pupils, to focus on the decentralization processes of school management, to review the reforms of early childhood education, to update and implement a new national qualification framework, to continue the reforms in higher education based on the introduction of the Bologna Process, and to make use of project funding supplied by the European Union. The principles listed in the document refer to both general and special issues of the strategical reform of the education system that take account of demographic trends, the economic and social backgrounds of learners, and sanction human rights by expanding programs for ethnic minorities and the socially disadvantaged.

The important reform points named in the 1995 Act in respect of compulsory schooling are the improvement of pupils' skills in general communication, reading, writing, and arithmetic, in information technology, and in respect to business-like skills, foreign languages, citizenship, democratic and critical thinking, the transferability of skills, team skills, and the fostering of interest in general and vocational education.

In the secondary sector, research into educational reform has focused on the following issues: the development of a new, end-to-end national curriculum based on a uniform philosophy of education and common principles and standards; supporting innovative trends among teaching staff, enabling them to adopt and deploy new approaches; and increasing teacher awareness of a change from teacher-centered to pupil-centered schools. Other documents take account of strategic aims relating to education reform formulated at EU level for 2001–2010 and the key issues and strategies of international bodies such as OECD, the World Bank, UNESCO, and UNICEF.

The central document for preuniversity education is the national curriculum. The national curriculum frameworks are structured on the basis of seven curricular

areas which were designated according to epistemological and psycho-pedagogical criteria. Subject syllabi contain attainment targets, reference objectives, and learning and curricular standards of achievement for Years 1–7 and general and specific competencies and relevant correlated syllabi, values, and attitudes for Years 9–12/13. There has been a transition from curricula focusing on objectives characterized by a certain degree of generality, impossible to avoid in the case of a diverse, but not yet specialized, school population, to curricula which are competence centered, more practical, and easier to evaluate in the context of pupils' integration into society and especially professional life (The National Curriculum 2001). No single national policy document exists for the higher education level. On the basis of the principle of university autonomy, which is grounded in the Education Act No. 84/1995, each university possesses a university charter that includes the university's mission, objectives, organizational values and principles, and curriculum framework and plans, as well as the rights and responsibilities of university teaching staff. Moreover, legislation from 2004 created the foundation for the restructuring of higher education in terms of a 3-level system of bachelor, master, and doctorate programs. A government resolution from 2006 concerns the restructuring of bachelor courses in harmony with guidelines provided by the Bologna Process. This determines 15 study areas and their differentiation and is applicable to all public and private higher education facilities. Cutting the number of study areas should enable the areas provided by the Romanian education system to be better coordinated with areas envisaged in European higher education in future.

39.2.2 Managing the Education System

Since 1995 the Romanian education system has identified four levels of governance: the central level, the regional level, the municipality level, and the institutional level.

At the central level, the Ministry of Education determines the general administration of education across the country. The Ministry of Finance and the Ministry of Labour and Social Solidarity have important decision-making roles in establishing both the size of the national budget for education and the workload for teaching and nonteaching staff. At the regional level in each region of the country, a department of education (*Direcția pentru educație*) makes technical recommendations and monitors funds allocated from the local budget. The regional level of decision-making exists only for preuniversity education. The municipal school inspectorate is responsible for administering education at primary and secondary level. It is accountable for the administrative affairs of all schools and extracurricular activities at primary and secondary level and for postsecondary education. At the institutional level, there are few observations and distinctions to be made. Headteachers are responsible for their schools.

An ordinance from 2004 stipulates that schools are managed by a school board. This also assumes responsibility for the school building and the land on which it stands from the regional authority. The school board is to be consulted when recruiting headteachers and deputy headteachers, and it approves programs for the

development of schools and their annual programs. In addition, it coordinates salary lists and the budget of the individual school and determines the number of staff employed per year, though it usually follows the recommendations of the chairperson and his/her deputy. One of its members is proposed by the board to evaluate the work of the headteacher based on directives published by the Ministry of Education and in doing so to consult recognized associations and other key players in education.

Higher education institutions (*universități*) are autonomous and report directly to the Ministry of Education. They are regularly evaluated by the National Council for Academic Accreditation. The university charter endorsed by the senate of each higher education institution is the document regulating the institution's operations. Governing bodies are elected by secret ballot for 4 years. The superior decision-making bodies are represented by university senates and faculty councils. The students participate in the senate and faculty councils: one fifth of the members are students. The rector is elected by the senate and approved by the Minister of Education. The rector has executive and representative functions with respect to the institution's relationships to other institutions and organizations. Usually a dean manages each faculty.

39.2.3 Funding

In 2008, expenditure on education amounted to 6 % of GNP. The largest proportion, 62.2 %, was allocated to secondary schools, 28.6 % to higher education, and just 9.2 % to the preschool and primary education sector. In 1999 it was held that the Ministry of Education allocated the funds to its subordinate units and to the county school inspectorates, which then distributed the funding to their subordinate units, i.e., the schools. The Ministry decided on teacher salaries too.

In the course of decentralizing educational funding, since 1999 local public bodies have provided the necessary funds for financing school education. To this end, local authorities use funds received from the government and from the local budget. This latest development is not without its problems: the total funds allocated from local authorities to education are not necessarily transparent, and in many cases headteachers need to save and funds are not deployed as needed. Real dialogue between schools and representatives of local authorities is not possible. The positive aspect is that the new school board has been established and all stakeholders in schools are invited to be part of a real social partnership that also includes financial issues.

Public nursery schools offering a normal program are completely free of charge. The state covers 50 % of the costs (meals and accommodation) of long and weekly programs. The fees in private nursery schools are established by each institution according to legal regulations. Municipalities in larger cities such as Bucharest and Sibiu, where most parents are working parents and where demand is high, have begun to expand public nursery schools and to subsidize accommodation in private day-care centers. Education in public schools, including the provision of some books and materials, is free of charge, but not all learning materials are reimbursed, and some books, materials, and uniform have to be bought by parents.

The reform program for higher education has included substantial changes in the area of financial administration in order to comply with the principle of university autonomy. The Ministry of Education finances higher education on the basis of the Government Ordinance No. 66/1998, which regulates the global financing of higher education institutions, allows these institutions to be autonomous in their decision-making with regard to the deployment of funds, and gives them the right to charge tuition fees. Private higher education relies on private funding.

39.2.4 Private Education

Private education is considered an alternative or a complement to public education, and accredited private educational institutions are a part of the national education system. Private educational institutions have organizational and operational autonomy, and they must comply with national standards. Private institutions for preprimary and school facilities are licensed following an evaluation conducted by the school inspectorate. Private upper secondary and postsecondary schools may be set up on the recommendation of the school inspectorate and with the consent of the Ministry of Education. Thus, across the country and at all levels of education, pedagogical alternatives such as Waldorf, Montessori, Step by Step, Jena Plan, and Freinet schools are provided.

Teaching positions in private preuniversity education are filled according to the provisions in the Statute on Teaching Staff, and curricula and syllabi have to be approved by the Ministry of Education. At present, 95.6 % of all pupils attend public schools funded by the state (National Statistical Office 2008). Private educational establishments are more common at the higher education level. Private higher education institutions are established and operate according to the provisions of the Education Act and have the same level of autonomy and the same evaluation and accreditation criteria, standards, and procedures as public higher education institutions.

39.2.5 Quality Management

The most efficient means of ensuring quality of education is the national adoption of the European framework for quality assurance. The National Agency for Qualifications in Higher Education and Partnership between Universities and their Socioeconomic Environment (ACPART) and the Romanian Agency for Quality Assurance in Education (ARACIP) were founded in 2006. These accredit school and conduct external evaluations. At present, these agencies are coordinated by the Ministry of Education, with the aim of developing and implementing a national framework on quality assurance in public education.

Based on international and national developments in this area, a number of measures were undertaken, focusing on improving teaching and learning and on evaluation methods and strategies to invest in educational infrastructure. In some

cases, basic and in-service training of teachers and school administrators is to be developed and improved. In the field of higher education, the *Diploma Supplement* was introduced within universities, issued upon the request of graduates, as a significant document to support educational mobility and the recognition of qualifications. With respect to quality assurance in higher education, Romania has joined the International Network for Quality Assurance in Higher Education and the network agencies for Quality Assurance in Higher Education for Central and Eastern Europe. It also intends to participate as a full member in the European Network for Quality Assurance in Higher Education.

39.3 Overview of the Structure of the Education System

39.3.1 Preschool Education (învățământ preșcolar)

This type of education for children between 3 and 6 years is provided in nursery school (*gradinite*), most of which are public. Nursery schools are free of charge, but some facilities charge fees to cover the cost of meals and transport. Although the last year is not compulsory, attendance is recommended and targeted. Preschool is organized in three age groups each containing an average of 15 children. In rural areas age groups might be mixed. Nursery schools are in most cases under the remit of general schools. Teachers in kindergartens (*educatori*) have completed 5 years of study in colleges of education or are trained teachers (*institutori*) who have completed a 3-year course at a university. Most nursery schools provide parents with a selection of three programs: the short program (mainly from 8 am to 1 pm, with no meal), an afternoon program (mainly from 8 am to 3 pm with a smaller and a larger meal), and a whole-day program (from 8 am to 5 pm with three smaller and one larger meal and a midday sleep).

The preprimary curriculum covers the following educational areas: communication and language, arithmetic, aesthetic education, environmental education, sports, and civics. Daily activities (4 h per day) are determined by the teaching staff and consist of games, outdoor activities, and compensatory leisure activities. At the present time, no assessment of pupils is undertaken in preprimary education. In the preschool sector, there are a large proportion of private nursery schools. Average fees amount to between 100 and 400 € per month. Normally children are introduced to foreign languages (mainly English or German) and learn to work with computers. Dancing and swimming are also offered. At least one meal a day is provided in all nursery schools. Some facilities have their own kitchen; others have meals delivered from external providers.

39.3.2 Primary Education (învățământ primar), Years 1–4

The main objective of the primary education curriculum is to provide an all-round education. The following areas are given special attention: knowledge of the

world and of people; the environment and environmental protection; knowledge of the national language and, beginning in the Year 3, a foreign language; mathematics; history and civics; the development of aesthetic sense; sports and physical education; health education; human and children's rights; and the development of democratic behavior. Teaching methods are not imposed by official regulations, but there are some recommendations concerning alternative textbooks, homework, and the use of IT for didactic purposes. Starting in the school year 1998–1999, a new evaluation system was implemented in primary education using a 4-level scale of performance. Pupils are given a school report at the end of each semester. In addition, there are tests especially in the main subjects. During the first 4 years of school, pupils are taught by a single teacher for nearly all subjects (*învățător*). Only in some subjects such as religious education or computer skills may classes be taught by a specialist teacher. Gifted pupils may be given special work. Teachers in primary education (*învățători*) have either completed 5 years of study in a college of education or are not fully certified teachers (*institutori*). Lessons are organized by subject and teachers are free to choose from alternative textbooks.

39.3.3 Lower Level of Secondary Education, First Phase (gimnaziu), Years 6–8

There are no entrance requirements and school attendance is compulsory. Lower secondary school teachers (*profesori*) have at least a bachelor's degree in their subject specialism. Every subject in lower secondary education is taught by specialist teachers. Counseling and vocational orientation are carried out by one of the class teachers, who is also responsible for coordinating the educational activities of the class and maintaining relations with parents. In addition, the County Centre for Psycho-Educational Support and Information and Counselling provides services and support as well as career guidance and information about the labor market. Lessons are divided by subject and teachers are free to choose from a range of approved textbooks.

The current main objectives of the general education curriculum are to transmit knowledge and instill respect for cultural and historical heritage, to develop basic skills and working methods, to develop communication skills in a foreign language, to promote personal development, to motivate pupils to continue learning, to stimulate pupils' creativity and initiative, and to prepare pupils for adult life. Pupils are continuously assessed by their teachers. In addition, a complex procedure of assessment is undertaken at the end of each semester. Written tests, especially in basic subjects, are held in each assessment session. The final mark awarded at the end of each semester takes account of achievement throughout the semester. In 2007, a national examination was introduced in Romanian language and literature and mathematics at the end of Year 7. The results of this examination are merged together with the results achieved 1 year later in Romanian language and literature, mathematics, and one of geography or history. The average marks

for these two examinations are combined with the overall average mark for the lower level of secondary education. A rank list of all pupils completing this level is compiled and used to allocate pupils to further elements of the lower level of secondary education. If pupils do not pass the tests, they have to repeat them. Should they fail again, they will have to repeat the school year. At the end of the *gimnaziu*, pupils receive a certificate that confirms their graduation and permits admission to the next educational phase. This level of schooling also provides education counselors (*consilier pe probleme de educație*) and school psychologists.

39.3.4 Lower Level of Secondary Education, Second Phase (clasele IX–X, învățământ obligatoriu), Years 9–10

The second phase of lower secondary education provides general, specialized, or vocational courses (2 years). The general education direction follows on from the lower level of the lyceum (*liceu*) which also prepares pupils for studies in upper secondary education. The specialist direction concerns education in specialist subjects and in military or art schools. Vocational schools – schools for art and crafts (*școli de arte și meserii*) – prepare pupils for the world of work. The transition from this school to the upper level of secondary education requires the completion of a supplementary year before entering upper secondary education. The curriculum framework comprises a common core of subject of the same number of lessons and specific specialized and vocational programs. Depending on the relevant school, differentiated profiles are offered in the vocational track. These profiles are aligned to the local economy. Graduates of the lower phase of lower secondary education are awarded a graduation certificate.

39.3.5 Upper Secondary Education (clasele XI–XII/XIII de liceu, învățământ post-obligatoriu), Years 11–12/13

Upper secondary education comprises the last 2 years of the academic track and the supplementary year for pupils who graduated from an arts and crafts school and who want to acquire a full upper level of secondary education. For the supplementary year, the curriculum has been designed according to the new structure of the education system and was implemented in the 2005/2006 school year. At the end of upper secondary education, there is a final examination (*examen de bacalaureat*) leading to a diploma (*diploma de bacalaureat*) that allows pupils to sit the entrance examination for higher education. The reform of the academic track of secondary education is aimed at easing access to higher education, at improving the quality of education and academic research, at decentralizing academic and financial management, and at promoting academic and social partnerships (Ministry... 2007).

39.3.6 Vocational Postsecondary Education (învățământ post-liceal)

At this level of education, only the medical and some private postsecondary schools require a baccalaureate diploma (*diploma de bacalaureat*); all postsecondary schools hold an entrance examination. The duration of study is 1–3 years, depending on the profile of the school, and is provided by independent institutions or institutions integrated into combined groups of schools belonging to the public or private sectors. Teachers (*profesori*) hold at least a bachelor's degree in their taught subject. Teachers of practical activities (*instructori*) must hold at least a postsecondary education leaving certificate. The curriculum includes a general and a specialized part. Practical training accounts for about 40 % of the course in the first years of study and 50–60 % in the last year. Post-high school education concludes with a final examination (*examen de absolvire*) leading to a leaving certificate (*certificat de absolvire*).

39.3.7 Special Education Schools

The policy of integration is currently being developed in Romania. According to a government report, most children with special education needs attend corresponding special schools. The structure of special education in these schools is very similar to that of mainstream education.

39.3.8 Higher Education

In more recent years, universities have had to deal with both an oversupply and a shortage of applicants, a reflection of the turbulence on the labor market since the 1990s. When many companies closed following the political reform, there was little demand for engineering programs. Since the post-2000 industrial boom, such programs have again become very popular. After 1990, law was in demand, a reflection here of the lack of trained experts. In the meantime, now that vacancies have been filled, the popularity of the subject has plummeted. Social sciences such as political science, sociology, and psychology are very popular because they were not available during the communist regime. There is also brisk demand for information technology programs. However, these are mainly offered in combination with mathematics and do not focus on applications. Admission is a matter for the universities themselves. Modalities have changed since 2007: most universities hold an entrance examination in a subject that comes closest to the study program selected. However, due largely to the superficiality and the insufficient reliability of multiple choice tests, universities are increasingly using essays, interviews, and projects to assess applicants. Students who graduate from universities are awarded a bachelor's degree (*diploma de licență*).

39.3.9 Adult Education

The adult education sector in Romania is a recent development. The main activities center around creating partnerships with other European countries as part of European Commission projects, compiling materials and publications, supporting adult education in a variety of areas, and offering courses. The National Institute of Educational Sciences in Bucharest participates in an EU project as a partner to develop counseling services (*The Development of Psycho-Pedagogical and Professional Counselling Services – Dppc*). One of the main aims concerns the development of a manual of specialist counseling skills based on Canadian standards and guidelines in career advice both in terms of adult education and lifelong learning. It is hoped that this will create a theoretical framework for a European-based system. At national level there is the National Councils for Vocational Adult Education under the auspices of the Ministry of Labour, Family and Equal Opportunities. This has initiated an accreditation process to harmonize adult education programs.

39.4 Developments in the Current School System

39.4.1 Instruments and Measures of Quality Assurance

In 2006, a national framework on quality assurance was anchored in law. At present, the main responsibility for quality assurance in the Romanian education system is in the hands of three institutions: the Romanian Agency for Quality Assurance in Pre-university Education, the Romanian Agency for Quality Assurance in Higher Education, and the National Centre for the Development of Vocational Education which supports providers of vocational programs and schools in applying the quality framework to the requirements of vocational-technical education. Legal provisions governing the monitoring of preuniversity education have been developed in the last 5 years and principally comprise a system of self-evaluation for schools and school inspections.

The Romanian Agency for Quality Assurance in Pre-university Education is a public institution of national interest that is under the control of the Ministry of Education. It has its own legal status and its own budget. The main idea behind the agency is to effectuate the external evaluation of quality in preuniversity and other educational facilities. This involves the authorization, accreditation, and rolling evaluation of educational facilities in this sector. The Agency elaborates standards, performance indicators, and regulations for evaluating institutions and for accreditation, has compiled a manual for internal evaluation, best practice guidelines, a code of conduct for experts in evaluation, and carries out accreditations, authorizations, and evaluations for all schools. Accredited schools are evaluated and inspected every 3 years, and the results of external evaluations are published. The national framework on quality assurance in vocational education has been developed on the basis of the European framework (CQAF) and is fully compatible

with its principles, methods, and instruments. Accordingly, curricula are being drawn up based on the new training standards.

39.4.2 Dealing with Special Problems and Support Systems

Since 2007 a number of research papers have dealt with the problems of the school system. Some of the most obvious phenomena at national level include the large number of pupils who leave without any qualifications and the number of pupils who have to repeat a year. Between 2000 and 2007, the proportion of school leavers without any qualifications rose from 0.6 % in 2000/2001 to 2.0 % in 2007/2008 (National Institute of Statistics). The situation was similar for pupils having to repeat a year. Among the main causes, the studies highlight the town/country differences and the relatively low status of vocational tracks. Given the problematic situation, support programs are currently being elaborated, such as the “second chance” program presently being run at 216 schools.

In the light of a paradigm shift from reproducing learning to problem solving, certain aspects of education and social integration have been the subject of particular attention in Romania. In this respect, action campaigns have been initiated from all groups of pupils with special programs developed for groups at particular risk. In an effort to support more disadvantaged pupils, programs are afoot to improve education in rural areas and to mobilize the participation of Roma in education, and there is the national plan to combat poverty and promote social integration.

39.5 New Developments

Key current points of discussion concern the pedagogical culture of dealings with everyone involved in the educational process and the quality of school education. To date, the relationship between teachers and pupils has been very much formal in nature. This has only begun to change in the last few years, where a friendlier more respectful tone can be observed. There is however a generation gap: while older teachers are often stricter and more demanding of respect, younger teachers are friendlier and more understanding. Nevertheless, pupils are still not involved in decision-making processes, and many schools still do not have a school council: decisions here are made solely by the school management. Relations between teachers and parents are for the most part also formal: teachers often summon parents at the beginning of a semester to discuss administrative matters at the school and again at the end of a semester to report on pupils' achievement. Those teachers who succeed in breaking through this formality and in reaching pupils at a personal level are respected by superiors and pupils alike.

The quality of the education system is increasingly a subject of public discussion, with focus placed on the results of Romanian participation in international studies such as PISA 2006, PIRLS 2008, and TIMMS 2007 or worldwide

comparisons of national higher education systems with other universities. Another issue that is discussed more and more is the poor remuneration of teachers. Although 6 % of GDP was apportioned for education in the national budget for 2009, given the financial restrictions, teacher salaries have not shown any distinct increase.

A series of strategies have been drafted that are to be implemented in the medium term: the National Strategy for Sustainable Development is to be implemented in stages in 2013, 2020, and 2030; the National Follow-up Strategy on joining the EU; the strategy to decentralize the Romanian school system, and the Strategy to Develop Romanian Higher Education 2002–2010. The work of the National Education Database is an example that has already manifested practical consequences. It prepares software that provides the Ministry of Education with a lasting, clear, and complete insight into the Romanian education system. The most important source of data is the National Table of Educational Indicators that provides detailed information on schools, teachers, and pupils. In the course of the project, a software was also generated to support educational administrative processes with respect to decision-making, evaluation, planning, forecasts, monitoring, and control. The software serves the need for information not only at national level but also at municipal and school levels as well as informing the general public. Reports on a variety of issues are published, multidimensional analyses of educational indicators conducted, and general information provided.

To sum up, it needs to be emphasized again that some educational facilities are failing to make decisions on personnel, materials, and financial resources on the basis of solid criteria. In these cases, decisions are made on the basis of criteria previously determined at a national, centralized level. In contrast, a decentralized school system that allows schools to function within their own organizational structures can make their own decisions in their fields of responsibility regardless of higher ranking structures in the political hierarchy.

The dearth of creative power on behalf of political decision-makers has led to a lack of coherence in the pursuit of educational aims and a somewhat ambiguous, clouded system of management. There is a shortage of unambivalent strategies to implement the goals of the Romanian school reform, there has been no realistic diagnosis of the current situation in the Romanian education system, and there is a distinct lack of skills to be able to deal with change – a point that is related to the general ineffective allocation of funds and especially the current financial crisis.

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G. Schmidt (✉)

German Institute for International Educational Research, Frankfurt, Germany

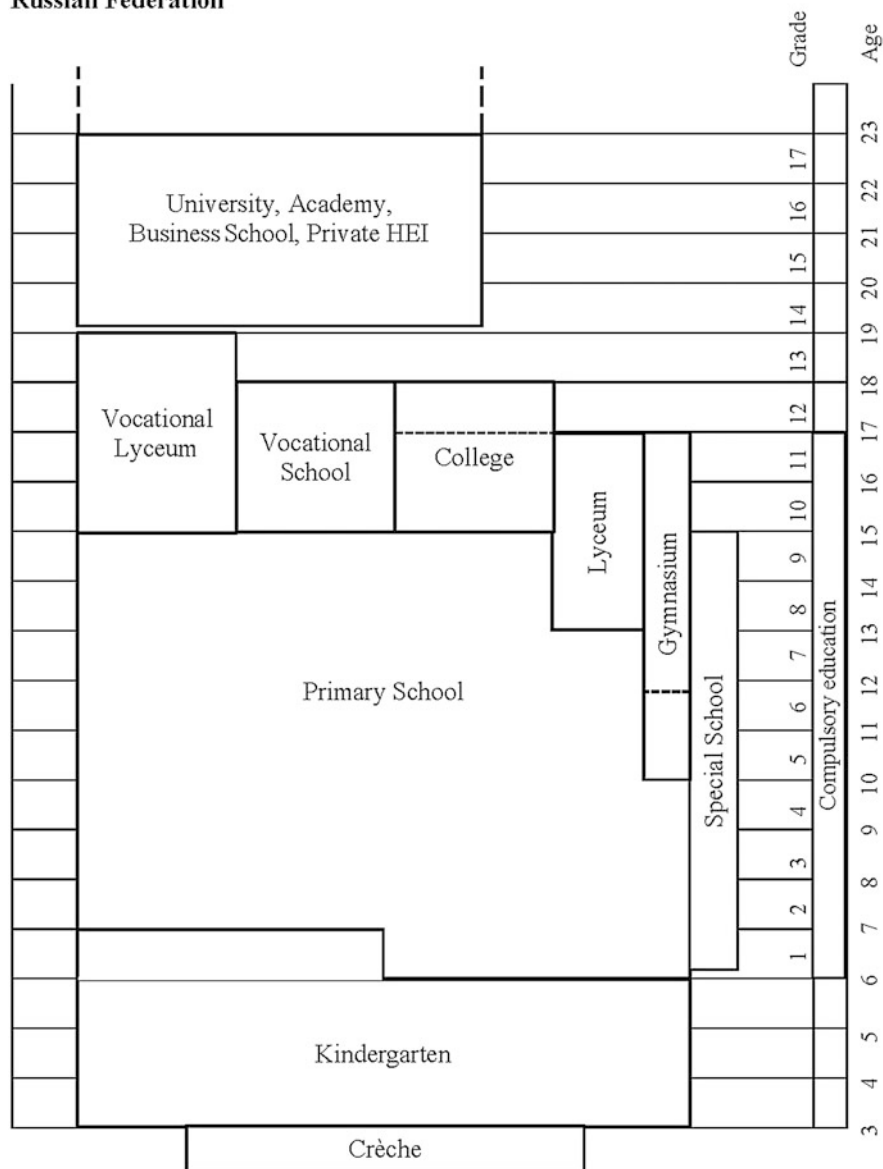
40.1 History and Social Parameters of the Education System

Public schooling and vocational education only developed in the course of the latter half of the nineteenth century. After the October Revolution, Bolsheviks made the education system one of the priorities: the abolition of widespread illiteracy was to be pursued; the emancipation of national minorities was to be encouraged by the development of their languages and cultures; and measures were to be taken to educate a qualified workforce for the centrally planned process of industrialization. The basic principles of the international education reform movement were mixed together with revolutionary concepts of linking school and society, learning and working, general and vocational education, and instruction and production. With the establishment of Stalinism at the beginning of the 1930s, the education system increasingly became an executive tool of a central, hierarchical, and totalitarian government. At the same time, it was an additional resource deployed to serve the planned economy. The school system returned to an authoritarian and uniform school type, with strict control over content and ideology. Initially, compulsory schooling was limited to four years and was then gradually extended in repeated attempts at reform. However, before the breakup of the Soviet Union, it was not possible to fully extend it to ten years or – by starting school at the age of six instead of seven years – to eleven years. As *Perestroika* took root, the fundamental ideas of the Soviet school system and the principles of its pedagogy and educational policies were no longer unquestioningly accepted. For decades the educational ideas of the early Soviet period, as well as of prerevolutionary Russia and modern international reformers, had been a taboo subject. However, as debate became more open, Soviet pedagogy was publicly condemned as “education from the military barracks,” “education without children,” and “leveling down.” Blame for the mistakes made was directed at the way contents had been influenced by the ideological dictates of the monolithic Communist Party and by the requirements of an economy and employment sector dominated by the so-called military-industrial complex. Calls now arose for the removal of ideology from education, for the introduction of a more humane approach, and for the humanities to be stressed rather than the natural sciences that had dominated until then. In addition, the concept of individualization was introduced, which meant that the all-round development of a person’s character was to be encouraged along with the fostering of his or her special skills and gifts. The state monopoly of the school system was dissolved, and schools were to fulfill a service function directed toward the interests of an increasingly pluralistic civil society.

40.1.1 Reform and Innovations Since the Political Upheaval of 1989

The Education Act of 1992 and the new Constitution of the Russian Federation, passed in 1994, laid down the basic legal regulations for the education system under the influence of a newly formulated liberal and democratic paradigm which embraced the construction of a democratic and federal state and the establishment

Russian Federation



of a civil society along Western lines. The economic system which was introduced was the free market, and elements of the market economy entered social spheres and the education system. In view of the glaring underfunding in the 1990s, the change of system led to numerous rampant and spontaneous changes in education

and to a considerable loss of quality. However, the reaction to issues relating to the structure of the education system, to content, and behavioral patterns within educational facilities was significant. Problems such as the comparatively short time at school, the traditional alignment of general education schools to the needs of higher education, the gap between the level and profiles of vocational education compared to the needs of the labour market, and the social reproduction within the education system have been on the agenda for decades. General value orientations and fundamental ideological questions – in particular in respect of the redefinition of history and literature lessons – and the relationship between religion and school education remain contentious.

The search continues for economic performance incentives to overcome the shortcomings of central planning in education and to secure the effective deployment of state funds. The solution has now been sought in the introduction of a competitive mechanism of a “quasi-market” and transferring from an input to an output and demand-driven education system. Given the underfunding of the purely state-run education system of the time, those involved in the education process were increasingly accepting greater financial responsibility for their education by necessity. Privatization took place not so much outside, but rather inside the state sector through the charging of fees for educational services. With the exception of the tertiary sector, private schools were slow to get off the ground. The public did not view the deregulation of the state monopoly in education and the establishment of private school and universities as a step toward liberation from state spoon-feeding, but rather primarily as the unwanted commercialization of education. The required decentralization – the shift of contextual and economic responsibility within the federal structure toward the bottom, i.e., to the regional and local authorities and to autonomous educational facilities – has to be initiated from the centralized bodies, i.e., from the top. This process is only proceeding slowly. It has been largely hindered by contradictions within the federalist concept, a dogged tradition of a direct, largely ineffective and not seldom corrupt administration, and the glaring shortcomings in the allocation and appropriation of financial funds.

Since 1999, attempts have been made to lead the education system out of its entrenched self-satisfaction in which it had survived in rather poor but astounding stability. Debts run up by educational facilities (deferred salary payments and energy costs) were gradually reduced, and in 2001, a project of modernization was concluded in order to create liberal fundamental positions of educational law and constitution in practice. This involves a package of measures to implement an economic-technocratic system of control while at the same time employing the ideas of national patriotism with regard to ideological contents. A turn toward the values of the tsarist era, including Russian Orthodox religion, coincided with the postulate for the retention of the strong points of the Soviet Union’s education system as “one of the best” in the world. The international opening of the education system was hindered further by the widespread conviction that the reform process was superimposed on the Russian education system by the “West”. Controversies between the supporters of a traditional concept of education, the promoters of an

economic-technocratic form of modernization, and the remaining educational innovators behind *Perestroika* continued to characterize public debate.

The authoritarian concept of state and democracy advanced by President Putin, in particular calls for a strong state, resulted in partial recentralization, the erosion of the democratic concept of federalism that had remained incomplete since 1991, the transition from a multinational to a national Russian understanding of the concept of statehood, and the tendency to grant the Russian Orthodox Church and religion a special status within the state. By proclaiming the sovereign as a “managed” democracy, the understanding of the notion of civil action changed. In this somewhat conflicting sense, the structures of social involvement in supervising and controlling the education and school system are to be built up, however increasingly managed by the state. Overall, however, the strongly held claim for a socially fair, reliable education system is louder than the demands on education policy to modernize with a sense of proportion. Likewise the divide among experts between modernizing on the one hand and the preserving or even backward-oriented forces on the other is exacerbating any desirable consensus on the educational playing field. Given this background, many prestige projects froze the testing phase or were eroded by numerous exceptions and divested of their original aims.

40.1.2 The Political, Economic, and Cultural Framework

The Russian Federation comprises 143 million inhabitants (2012). The birth rate is low, and there is a continuing decrease in the size of the population. Given the ongoing rural exodus, 73 % of its inhabitants live in towns and cities. The expensive maintenance of rural schools is hampered by the scattered settlement structure. Some four-fifths of the Federation’s inhabitants consider themselves Russian. The majority of non-Russians, whose numbers are estimated unofficially to be much higher, are classified as Muslims. Besides the initial influx of Russians from the new former Soviet neighboring states and refugees from North Caucasus, global flows of migration, primarily from Asia, are now reaching Russia. However, democratic development will be assessed critically in the future. Economic growth, which has been slowing down since 2010, is likely to have an unfavorable effect on people living on or near the poverty line and on unemployment.

Russia consists of 89 federal area units, the so-called federal subjects, more succinctly referred to as regions (*oblasts*), and the cities of Moscow and St. Petersburg, but they also include 20 national republics of the non-Russian titular nations with diverse administrative structures. Each of the seven federal government areas set up as part of the recentralization process comprises several regions and aims to ensure greater cohesion among the regions. At the same time, the Federation Council, the upper house of the parliament, was deprived of its power. The establishment of new structures of local administration in the communities (municipalities) based on codetermination as part of the development of civil processes is only progressing very hesitantly. The socioeconomic and cultural

situation in the regions is highly discrepant (variation in regional per capita income in 2000 according to UNESCO was 1:28). Educational policy-making was faced with the task of guaranteeing a political, legal, and organizational “unified education space” beyond the boundaries of the federal territories. It also had to provide common contents and to compensate for regional and social disparities. Administrative structures and regional educational politics vary, although priorities have been set in the service of special ethnic-national interests on socioeconomic goals and setting certain framework conditions.

There is a huge shortage of qualified labor for the production sector which is slowly beginning to pick up steam again; the continued decline in pupil numbers – from 20 million in 2000 to 13.4 million in 2012 – can be expected to be alarming. Given the shortcomings within the state vocational sector, larger companies have begun finding replacement forms of vocational training for careers in demand. As part of the latest efforts to restrengthen state influence on the economy, the private sector is to be more closely integrated in vocational education. For the present, however, there are no suitable structures or instruments in place for this.

The school system and in particular vocational education have to face the consequences of social denial over the last two decades: many families find it difficult to fulfill their previous function of bringing up children. The general poor state of health of pupils cannot be ignored, and the number of homeless and neglected children has increased significantly. There has also been a growth in the number of young criminals and drug addicts. Lastly, the social situation and social esteem of teachers have declined; salaries are sometimes considerably below regional average incomes; and the traditional high prestige, respect, and regard to teachers have diminished.

Since the end of the 1990s, the ethnic diversity within the school system has become a peripheral issue, and there has been an obvious spread of xenophobia. Nonetheless, in view of the number of pupils who are refugees or were forced to resettle, individual teachers have tried to set a good example. Figures available are extremely contradictory: very low national projections on the one hand compared to a proportion of roughly 17 % of migrant pupils in the last ten years in Moscow on the other (author’s own assessment). Reports in the media claim that children of the growing number of people living illegally in Russia – immigrants who do not have Russian nationality and often do not speak Russian either – are frequently not admitted to state schools.

The broad public raised problems of payment for education. Access to free university study can hardly be obtained in the light of costly revision courses and increasing corruption. The number of university places that are subject to tuition fees is growing, partly because going to university releases students from conscription. The decline in matriculating pupils rooted in demographics appears to have put the brakes on the expansion in higher education. For the school system and vocational education, the conventional demands and expectations on an egalitarian, state-run, and financed, socially oriented education that lead to a secure job seem to last an eternity. This is related to a historically anchored rejection of elitism in

education, of commercialism, and the privatization of education; there is hardly any distinction between charitable and commercial education. This does not undermine the educational aspirations or the willingness of the new middle class to pay for education. Admission to higher education, particularly to the universities, now depends to a large extent on the social and economic standing of the family. All these have resulted in a gap developing between the winners and losers in the process of educational reform.

40.2 Fundamentals, Organization, and Governance of the Education System

40.2.1 General Principles Since Political Reform

The general principles are based on the first Education Act of 1992, amended in 2012, and the Constitution of the Russian Federation of 1993. In addition there are the National Doctrine for Education (1999), the Conceptualisation of the Modernisation of the Russian Education System (2001), and the National Project Education (2006). The central political aims include a strong focus on the needs of a growing economy and a knowledge-based society and on the international competitiveness of the education system. In principle, the cornerstones – accessibility, effectiveness, and quality – remain. In addition, education should also focus on the changing image the country has of itself in terms of state, democracy, and its own history. The emphasis in educational policy continues to lie on the economic-technical aspect of implementing a neoliberal control paradigm. The length of schooling and university programs and the structure of content and qualifications from primary to adult education and the needs of lifelong learning are to comply increasingly with international standards. It remains to be seen how the necessary bridges can be balanced by outdated paradigms from the Soviet era.

40.2.2 Basic Legal Principles

Both general human rights and citizens' rights are laid down in the Constitution, including the prohibition of discrimination for reasons of ideology, politics, religion, and ethnic background. Strong elements include freedom in research and teaching. For the school system this involves, in particular, the general right to education as well as the right of ethnic minorities to be taught in their native languages and to be able to freely choose the language of instruction. The learning of Russian as the national language is compulsory, but the state has no obligation to provide instruction in other native languages. In addition, the Education Act states that schools are obliged to provide civic and patriotic education. Whereas state institutions of education are bound by the principle of secularism and are committed to political and ideological neutrality, non-state institutions, i.e., private schools, are permitted to pursue religious and ideological objectives.

Special regulations on state recognition of educational programs from the Russian Orthodox Church, which has practically assumed the position of a state church, are contrary to the Constitution. Ultimately, the right to have educational facilities maintained applies to non-state bodies but also private providers such as companies and private persons, originally also from abroad, which more or less invalidates the state monopoly of education. All educational institutions can use their own income; however, they are subject to tax obligations just as private business. To date, it has not been possible to secure tax benefits on a permanent basis. Educational facilities have gained limited autonomy by also acquiring the status of legal persons. The right to free education in state preschool, school, and higher education facilities has been established in law and thus grants equal access opportunities to all levels of education.

Gaps, contradictions, and overlaps in education that have arisen over time have repeatedly led to activities in policy-making, the latest results of which are contained in the new law on Education in the Russian Federation of 2012.

40.2.3 Governance

Governance in the Soviet era was based on tightly centralized planning implemented through directives and controls and on traditional hierarchical administration. The new governance paradigm defines the education system as a provider of educational services that has willingly accepted the educational briefing of the state, the economy, and the society and whose financial basis still lies largely with the state. The educational policies defined by the state – for which the federal Ministry of Education has laid down regulations, guidelines, and control indicators – have dominated to date. Society has realized its briefing based on the demand for school education and university programs, provided selective entrance rules; high financial contributions or geographically immobility do not stand in the way. Systematic monitoring using indicators and a tightly meshed control of achievement (output) is intended to provide the necessary transparency for state control and information on the educational facilities and the users. One of the cornerstones of this paradigm of governance is the new status accorded to educational facilities called autonomous facility, which is intended to improve the leeway – facilities have to secure their own funds and conduct commercial activities. In order to speed up the implementation process, a competition was introduced in 2006 to acquire funds for innovative projects (National Project Education). At the same time, synergies are to be leveraged by merging and networking institutions and players (state, economy, society) which requires the establishment of new forms of institutions, in particular for the cooperation between the state and the economy.

Responsibility for the implementation of decisions lies with the federal (national) Education Ministry, which was expanded in March 2004 to form the Ministry of Education and Science and was reorganized to offer supervisory and

control functions in addition to the services offered in its general policy departments. Although the traditional areas of responsibility at branch ministries for nonuniversity-based vocational education have been repealed, they are still partially responsible for higher education. Decentralization and the extension of political and financial responsibility to the regions, both of which have been targets for a number of years, have been advanced since 2004. State schools and preschool institutions are nearly all organized by the municipalities. These are now only responsible for the general maintenance of operations and the material safeguard of the facility. Despite the fierce opposition, responsibility for vocational schools and gradually the upper secondary schools was transferred in 2005 from the Federation or the branch ministries to the regions. While the regions – with their own legislative powers and executive bodies – were strengthened as key players in educational governance, the influence of the municipalities of the local school system tends to be dominated by patterns of traditional contract administration; educational facilities still call for conventional state input. Many local administrations have no political influence.

According to the Education Act, the national Ministry is responsible for the federal education standards in the country in terms of common fundamental requirements of content; the standards still need to be passed by the Duma to become law. This is different than in vocational and higher education; for the general education schools, this has happened only very recently. The Ministry determines the regulations for content and the recognition of examinations and certificated standards for equipping, inspecting, and approving educational facilities and the foundation for remunerating staff. The regions are responsible for defining the salary system, the basic funding is however a matter for the Federation. The regions have also been made responsible for the qualitative assessment of, and the granting of licenses to, educational facilities and for the accreditation necessary for recognizing qualifications at both non-state and state facilities. The Ministry's responsibility for approving, funding, and supplying the region with school books has gained additional significance in the light of the public controversies surrounding the contents of the books – especially literature and history books. Schools have the right within their autonomy to select their own books from those that have been approved. Restrictions are often set indirectly through financial means. The right to make decisions independently – existentially important questions of finance, providing order to internal processes by means of bylaws, profiling the school, and introducing new teaching methods – is in the hand of head teachers and filled with content by the teaching staff. Special educational programs compiled within a school are to be accredited by educational administrators, a considerable challenge for many schools still today.

The executive – i.e., the President and the Government – is trying, at least in form, to include the broad public when fundamental documents are drawn up, such as school education standards, in advisory boards such as Civic Chamber and the Council of Experts, and through the internet. The cooperation of parents in schools is to be strengthened as is the inclusion of business in the education system. The school's board of trustees is to provide information of the origin of funds for

the sake of transparency and public control. This also applies to success and failures of schools in examinations, for example.

40.2.4 Funding

The Education Act stipulates that educational expenditure is eventually to amount to at least 10 % of the national income. However, as a proportion of gross domestic income, total state expenditure on the education system hovered around 3.5 % from 1995 to 2007 until it reached 4.1 % in 2011 (4.6 % in 2009 according to the Ministry of Education, largely due to a drastic fall in GDP).¹ It is not unusual for contributions of private maintenance bodies, in particular for fee-charging services, to be added to state expenditure which could lead to a higher overall proportion of (public and private) education outlay in relation to GDP of over 5 %.

The basic philosophy behind funding follows the Anglo-American approach that “money follows the child.” This implies that educational facilities should vie for users in a competition for state and private funds. This was seen as the suitable mechanism to raise the efficiency of funds deployed. The decisive framework was shaped by the political decision to ease the burden on the budget by including users, in other words, business, society, and individual participants in the educational process, in the funding. With Putin’s accession to office (1999–2000) and the repayment of debts incurred until then by the state and the communes – especially with the National Project Education – the financial situation of the education system, and in particular the schools, has improved. The postulate of modernization, multilevel public funding (federal, regional, and commune), joint public-private funding, tapping additional funds from the private sector by state linear and per capita funding, increased efficiency by improving the structure of programs, and the disclosure of payment flows have all been slow in their implementation: too little money actually reached its intended target.

The National Project provided funds earmarked for special challenges and problem areas in addition to the Federal Target Programme for the Development of Education 2006–2010 including promoting talent and the expansion of the use of computers. A system of financial incentives was launched aimed at initiating innovative competition and supporting the implementation of new projects, including the activities of the best teachers. The concept was partially extended to include sectors of the education system. Since 2007, an innovation competition among the regions has been added which aims to accelerate the distribution of central reform projects from the Ministry of Education: per capital funding, performance-related remuneration, the continuous evaluation of educational facilities including

¹Unless otherwise stated, the statistics included in the present text are taken from the annual book of statistics (Russian Statistical Yearbook 2012), official statements from the Ministry, and the White Book of the Russian education system. These sources are not always compatible; it is particularly difficult to check the percentages given, and even more so, their interpretation as the reference basis is not always precisely quoted.

monitoring, and finally the streamlining of the school, vocational college, and university network. Support is also given to setting up committees to control external funding and quality which should call on people from the society.

Due to wide objection, especially in the absence of control and administrative structures, competition in the initial 31 regions involved progressed slowly. While prosperous regions, such as those in Siberia with their wealth of raw materials, are able to grant teachers considerable allowances, or such as the city of Moscow which continues to provide schooling free of charge, schools and teachers in places with an often abandoned industrial monoculture are suffering from considerable economic problems. Variance among the 81 federation subjects for per capita expenditure is striking. Since the responsibility for vocational schools was transferred to the regions in 2005, the situation of the vocational sector is particularly precarious. It once filled a social role that is now seriously waning: pupils coming from socially disadvantaged homes where education is not valued, are becoming less motivated to achieve.

Schools have yet to profit at all from their new economic and financial autonomy. Many schools are now charging for some educational services including having parallel courses for paying and nonpaying pupils. In the meantime, this practice has however been prohibited. Some parents have to pay for maintaining school operations such as cleaning and security services, etc. In principle tax-free income from educational services has to be reinvested in the teaching process. However, much of this income is simply not declared. In higher education, programs within the state contingent are generally free of charge. Candidates who did not pass the entrance examination can still find their way to university open through fee-paying places whose numbers often exceed the contingent allocated to non-fee-paying students. In trials, the education voucher – the so-called GIFO that was linked to the marks in the central school leaving examination – ended in failure. In 2008, however, substantial funds for student loans were granted on a trial basis. This was an instrument already envisaged in the Education Act. Subsequently, universities secured considerable additional income through rental income, establishing private commercial subsidiaries or through educational offerings. This was largely used to increase the low salaries of teaching staff. Smaller tax benefits were regularly not granted by the education administration; despite objections from the education sector, these benefits are no longer provided for in the Law on the Autonomous Facilities (AU 2007). The proposed increase in teacher salaries that are significantly lower than the regional average in the private business sector and which do not even reach subsistence level in some poorer regions continues to be a problem. The previous increase in scholarships (about 20 % of the subsistence level) has only brought about a marginal increase in the situation.

40.2.5 Public and Private Sector

Non-state institutions of education have to go through a licensing (admission) and certification (evaluation) procedure before being granted state recognition for the

issue of examination certificates (accreditation). With the exception of higher education, privatization at institutional level has only been slow. Besides the approval of those involved, in many places there is a lack of support from the administration. By expanding their fee-paying services, private educational activities gained key access to state schools (privatization within the state sector). This involved a shift away from the principle of competition between state and non-state educational facilities that was anchored in the Education Act, which has recently attracted support again among experts. Legal claims whereby private schools are to be awarded the same state subsidies per pupil as state school was repeatedly ignored before being repealed in 2006 in the face of vociferous criticism even from the Communist Party. While 1.5 % of schools are private facilities, 40 % of universities and nearly 10 % of technical colleges are private (2011). Private schools and religious academies maintained by the Russian Orthodox Church have a special status. In violation of the Constitution, the academies were recognized by the state in 2007, largely due to the convergence of state and church.

40.2.6 Quality Development and Support

Initiated by the long-standing participation in the IEA studies and the PISA tests, a special monitoring system was set up by the Education Ministry that provides regional, local, and individual performance details differentiated for politics, science, administration, and for those involved. The uniform state examination (EGÉ) at the end of the secondary school that has been tested since 2001 and obligatory since 2009 has been a key development. Just as the broader public is unfamiliar in handling protected individual data (on individual institutions, teachers, or learners), the conceptions of the possibilities and limits of quality measurements using indicators are still vague. In view of the decline in pupil numbers, the pressure to cut back on resources and jobs has led people to draw simple conclusions. By focusing state support on excellence in educational facilities, issues of institutionalized support to problem schools and the encouragement of pupils with learning difficulties or with behavioral problems have taken a back seat. Several facilities at federal and regional levels are wrestling with the principles, procedures, and methods of quality assurance and monitoring. The National Staff Training Foundation (NFPK) financed by World Bank loans has rendered substantial groundwork, including empirical studies.

Without any radical improvements on the horizon, the critical situation regarding recruiting new staff and in-service training of current teachers has increasingly attracted attention. The previous uniform salary system with its focus on length of service has been annulled and replaced by a system of incentives. Accordingly, 70 % of a teacher's salary is fixed, and 30 % is based on performance guidelines. As is critically pointed out, given the tense financial situation in many places, extra payments can only be achieved during a transition period by freezing basic salaries or by cutting staff numbers. In-service training is conducted at universities but also at special regional centers. Particular attention is bestowed

on in-service training for head teachers, with organizational, legal, and economic aspects of school management central to the training.

40.3 Overview of the Structure of the Education System

The extension of compulsory schooling to eleven years (2007) and the introduction in 2009 of the obligatory bachelor and master programs are the cornerstones of the future structural developments in the Russian education system. A variety of new types of school and of school “complexes” (*kompleks*) or organizational associations have grown up alongside the individual sectors. These serve to promote particular talents, to make admission to higher education easier, and to assist in early access to vocational orientation and preparation. The decoupling of the conventional structural allocation of programs from certain sectors can be traced back to the early 1990s. The legal framework is represented by the autonomous educational facilities, commercially independent providers of the educational market.

The school system of the Russian Federation includes a tiered *preschool sector*. It comprises crèches for infants up to the age of three, as well as kindergarten institutions attended by older children up to the age of seven. In view of the fact that many children start school comparatively late at the age of seven, there have been a variety of attempts to redesign the transition to school. In kindergarten, children are of course prepared for school; however, anticipating school-based content in preschool education is a contentious issue. The state is keen on advancing the quality and quantity of preschool education. This has been given additional impetus by international developments in early childhood education.

Kindergarten is followed by a *general (comprehensive) school*, which is divided into three age levels. Urban areas are making particular progress with the targeted expansion of the four-year primary school to replace the three-year primary school, with more children starting school at the age of six. A key moment was the decision to switch gradually to a compulsory two-year upper secondary stage differentiated according to a variety of profiles. It builds on a general education (acquired upon conclusion of Year 9) and ends with a certificate of complete secondary education, entitling pupils to take their university entrance examination after 11 years. This certificate can also be acquired retrospectively in vocational and technical school and in evening (shift) schools. Controversial plans from the 1990s to shift to a 12-year school education were officially abandoned. The secondary school certificate, the university entrance qualification for school leavers, has been obligatory since 2009 in the form of a centralized uniform state examination (EGÉ). It allows entry to university without students having to take a specific entrance examination, with few exceptions (e.g., art subjects). Pupils successful in the traditional subject Olympics do not have to take the EGÉ.

Besides the regular school there is also a range of new, enhanced types of school and organizational associations. They foster particularly gifted children and ease access to higher education and can comprise a targeted professional preparation

applied at an early stage. For the schooling of children and young people requiring special care and support because of social, physical, or mental reasons, there are numerous special needs institutions. Drawing on international developments, recently arguments have been propagated for the *inclusion of handicapped children* in regular schools. In addition, leisure activities for children and young people are provided outside school in institutions of supplementary education, an area that has recently been networking with the school system or has been integrated in institutions to boost the educational function of the school. A part of the system of general education is the evening (and shift) schools.

Secondary vocational education is represented through a varied multilayer system that, besides offering short-term learning phases in enterprises, can be traditionally broken down into training in *vocational schools* and *technical colleges* and which reflects the conventional social hierarchy of the labor market. In a sense of promoting social mobility, vocational education also fulfills the function of a link between secondary and higher education. By extending compulsory schooling to eleven years and accelerating university reform in line with the Bologna Process, in its role as interim station, this sector is facing some major challenges. Its position in the future structure of the education system has not been clearly defined. Simple vocational qualifications can be obtained in vocational schools without students having gained the general secondary certificate. The majority of students however takes the longer path and combines vocational education with their certificate of secondary (complete) education. A smaller proportion of vocational students already have this certificate, which significantly shortens their training. Within the area of basic vocational education (NPO), new enhanced vocational cycles, offering greater career opportunities, have been created. The extended secondary vocational education (SPO) also awards qualifications. Besides technical lyceums and specialist institutes, this also includes the newly created and highly flexible colleges, many of which have been established within an association. They are primarily focused on education and training in new qualifications with more stringent requirement and are often fee-paying. Pupils passing through Year 9 can gain their complete secondary education certificate at secondary vocational educational schools. The first two of up to four years still form part of ISCED level 3, the others and the years counting toward the final certificate level 4. Many pupils from the enhanced types of vocational education, the vocational lyceums (NPO), and colleges (SPO) continue to study at university, where, under certain circumstances, courses can be shortened by at least one year. In many places in recent years, vocational schools, which in the past were independent institutions of basic vocational education, have been merging with specialist secondary schools. Following the example of Moscow, colleges could be integrated as a third level and even participate in the introduction of bachelor courses; there are at least many opportunities of transferring to the second year of university courses.

Institutions of higher education in Russia have traditionally been centers of learning; while research has primarily been the reserve of scientific academies, heading the list is the Russian Academy of Sciences (RAN). Universities, academies,

and institutions were defined as an element – indeed at the highest level – of the system of vocational education. More recently, however, they have increasingly become responsible for research, with the financial aspect also growing in importance – in other words, the acquisition of additional funds. In the past, higher education courses led to the award of a diploma after a five-year course of study; these institutions also offered shorter courses, however. Not without controversy has been the obligatory transfer as part of the Bologna Process to the internationally promoted structure of the bachelor's degree (four years) and the more research-oriented master's degree (two years). The traditional five-year programme (diploma) has remained for selective disciplines, such as medicine, for example.

Lifelong learning represents a core element of the proclaimed educational policy, with clear distinctions established between formal and nonformal learning. Education in Russia is basically seen as a systematic process, with independent study valued most highly. In this sense, therefore, the concept of informal, spontaneous learning has carried little weight. Professional training and development and retraining and general adult education have largely been left to the private sector since the political reform. The state is making noticeable effort to provide official certification and control, and new forms of public-private cooperation are being tested. In the course of building up an institutionalized labor market, the new employment agencies had only limited success in introducing retraining measures. Postgraduate education is a well-established progression for university graduates. This is covered to a large extent by the tertiary sector and is maintained by state bodies and jointly financed by users and for some professions, such as teachers, is obligatory in a multi-annual rolling program.

40.3.1 Elementary Education

Whereas in 1990 there were still 87,900 preschool institutions, the number dropped to 44,900 in 2011. Only 20 % of the institutions are in rural areas. In cities, the recent increase in the birth rate has meant that they are overcrowded. The communes are largely responsible for maintaining them. Roughly 51 % of preschool facilities in 2011 were pure kindergartens with just under 1.5 million children. The other institutions were crèches. Whereas two-thirds of an age group attended preschool institutions in 1990, in 2011, following years of decline, the figure rose up to 60.6 %, or 5.7 million children. Institutions can choose from general or profile-related development (e.g., musical, intellectual, or in foreign languages) to compensate developmental retardation and strengthen children's health. In the meantime, educational standards have also been developed for preschool institutions. In 2007, 10,500 preschool children with (slight) handicaps and behavioral problems were looked after. Non-Russian speaking groups (headed by Tatar) accounted for 119,000 or 2.4 % of children in preschool facilities; bilingual groups (Russian and other language) accounted for 183,000 or 4.1 % of children. Although the service is supposed to be free of charge for the socially needy, fees – varying considerably from region to region – have become standard.

The organizational variety in kindergartens allows for preschool education that follows Year 1 programs and that wholly accommodates the first few school years or special groups.

40.3.2 Primary and Secondary Education

The core of the general education school system has been a comprehensive school of general education divided horizontally and leading to a certificate of basic general education at the conclusion of nine years of compulsory schooling (obligatory until 2007) and to the complete certificate of secondary education upon conclusion of a two-year upper band (obligatory since then). Up until the 2000s, two-thirds of school starters were seven years old. The majority of them completed the four-year primary school in three years, transferring from Year 3 directly to Year 5 of the secondary school. In reality, a large proportion of pupils currently only complete ten years of school instead of the proclaimed eleven years. The extension of schooling is a recurring target back into the Soviet era.

In 2011, there were 47,100 general education schools, 28,300 of which are located in rural areas. In 2000 these accommodated 20.1 million pupils; today just 13.4 million (not counting evening and shift pupils). The decline in pupil numbers of nearly one million per year is currently slowly down in view of the increasing number of school starters. In 2011, 61 % of secondary schools covered all three education levels (Years 1–11). Purely primary schools (about 15 %) are mainly to be found in rural areas, and the good number of single-class schools is being cut by the introduction of school centers. Twenty-six percent of all schools (with 14 % of all pupils) still operate in more than one shift. The recovery of full-day schooling, which was never fully established even during the Soviet era, is stubbornly slow.

With some expansions and new emphases, the traditional range of subjects inherent to Soviet school has largely remained unchanged. The curriculum defines overall times for individual groups of subjects such as language and literature, art, social science, mathematics and natural science subjects, IT, as well as for practical subjects, technology, drawing, and sports. Since 2011, new federal educational standards have been introduced year by year. This envisages the start of foreign language lessons as early as primary school. The planned general transition to profile-based education (from 2016) is expected to ring in considerable change, in particular for the two upper years, Years 10 and 11. The differentiation of profile modules in terms of content is intended to ease the burden on pupils, foster and develop individual skills and particular talents, and to contribute to focusing and preparing pupils for their continued path of education, primarily at university.

Lessons are still very much teacher-centered, but the teacher/pupil ratio (2011: 1:13), thanks to numerous country schools, is good in an international comparison. In Year 1 pupils have 30 lessons per week; in Years 2–11 34–37 lessons per week. Some schools also teach six days per week. Compared to other countries, pupils receive a considerable amount of homework (up to 3 h per day for older pupils).

On average, less than 1 % of pupils have had to repeat a year; by extending compulsory schooling to eleven years, this figure could well grow. Pupils take examinations at the end of Year 9. Success at this level leads to the award of the certificate of general education. Instead of the traditional written and oral examinations at the end of Year 11 that were the prerequisites for taking university entrance examinations, new uniform nationwide examinations (EGÉ) were introduced in 2009. Pupils who are not fortunate enough to attend school in the privileged larger cities or who come from underprivileged educational backgrounds should find it easier to gain access to university and to apply to several universities at the same time instead of the one university, as has been the case so far.

A variety of new types of schools have developed alongside regular schools. Besides schools with specialist lessons in selected subjects, these are the grammar schools (*gimnazii*, from Year 5 or Year 7) with an enriched humanities profile (1,438 state-run schools plus 116 private schools, i.e., 1,554 gymnasiums for 1.07 million pupils). There are also lyceums (1,074 state-run plus 42 private schools for 743,000 pupils, as of 2011), most of which begin in Year 8 or 10 and have mainly natural sciences and technical profile. Characteristic of these types of schools is that they increasingly charge fees for lessons. Grammar schools and lyceums account for 3.3 % and 2.4 % respectively of all schools and a total of 13.5 % of all pupils (2011). Pupils at these facilities are prepared for university study and are over proportionally represented when they get there. A small number of traditionally renowned boarding schools, the cadet schools, cooperate with military academies and institutions of higher education; they provide pupils from Years 5 or 9 with special preparation for entry to higher education and a military career. Girls have recently been accepted into these facilities.

There is little information on the network of “national schools,” which are largely located in the twelve national republics as well as in other places with an ethnic non-Russian or very mixed population, including Moscow. A distinction is made between schools taught in a native language or with this language as a separate subject. They are called schools with ethno-cultural and indigenous profile (for ethnic-national groups) or national-cultural and regional profile (for the titular nation of a republic); the Russian language is obligatory. According to information from 2005–2006, lessons were taught wholly or in part in 1 of the 28 non-Russian native languages at Russia’s 3,091 educational facilities for 201,700 pupils (often not up until the higher years of school). As a subject, 1 of 79 native languages in 2,906 schools was taught. However, this does represent a decline. Reports from Tatarstan, for example, indicate that Russian-speaking parents are complaining about the cuts in lessons in Russian language and literature which schools have to make.

In 2011, there were roughly 700 non-state schools (about 1.5 % of all schools) attended by around 84,000 pupils (0.6 %). Most private schools are to be found in Moscow and St. Petersburg. With an average of fewer than 100 pupils, many of these schools are very small; the majority of them have been planned as complete secondary schools. Given the recent restrictive educational policy decisions, the economic stability of many private schools is in jeopardy. Rapid increases in rents

and leases and tax liabilities are impeded by natural upper limits to school fees: only a few private schools can fall back on a clientèle that includes financially strong families, and many private schools have to keep school fees low (monthly between 3,000 and 5,000 rubles, or 140–180 €). In terms of the social background of pupils and the quality of lessons, there is little to distinguish most private schools from better state schools. In 2004, there were just fewer than 100 private, predominantly Orthodox schools (without any indication of denomination).

Since the political reform, roughly 15 % of pupils in a cohort have not completed compulsory schooling. Pupils can however catch up on their general school leaving certificates by attending one of the 1,200 evening and shift schools (2011). Appropriate, growing numbers of courses are also provided by other educational facilities, in particular by general education schools looking to utilize capacity that has become available due to declining numbers of pupils. Estimates of the numbers of children and young people of school age who do not attend school at all vary considerably (e.g., 2000: 1.5 million, UNESCO; 2003: 709,000 or 4 % of 7–15 year old, including many migrant children and children from illegal immigrant families, internal Russian source).

40.3.3 Special Schools

Internationally, special or “remedial” schools in the Soviet era had a good reputation, particularly with visually or hearing-impaired children. Special education schools comprised day and boarding schools for mentally and physically handicapped pupils. Attended by only 1.5 % of pupils, this group had a very marginal status. It was not until the end of the 1980s that supplementary provision was made for the considerable number of children with lesser learning and developmental deficits or other behavioral disorders. The lack of places, an issue that has been raised for some years now, is unlikely to be resolved in the future. In recent years, however, the policy pursued has been one of inclusion in regular schools. For 2011, a total of 320,600 pupils with handicaps or behavioral disorders were identified (2.4 % of all pupils). About 35 % of these, or 111,700 pupils, attended special classes in regular schools. The remaining 208,900, or 65 %, attended the nearly 2,000 special schools in the country (4.3 % of all schools). Overall, there are 15 differentiated educational programs that take account of the psychophysical characteristics of pupils at the level of general education. The integration of disabled pupils in regular schools and regular classes, supported by the World Bank, takes parents’ wishes and the situation regarding the local school network into consideration. However, the process should also not be to the detriment of all pupils: this is not without its controversies. One other particular problem group consists of the growing number of social orphans living without parental care and homeless children (according to official figures 133,000 in 2005). The trend is that children without parental care no longer tend to be put into homes and boarding schools but are increasingly placed with foster families. This has not been without its difficulties.

40.3.4 Out-of-School Organizations and Events

The sphere of supplementary education comprises out-of-school education and teaching and has increasingly been urged to promote the character development of children and young people. Emerging from the take-over of the Soviet pioneer palaces and youth clubs, this aspect of education displays a great diversity of structures in its different institutions, most of which are now run by regional and municipal authorities. Activities are provided in sports and the arts, and there are also children's and young people's music schools and holiday homes or camps. In 2008 they accommodated eleven million children and young people between the ages of 5 and 18. From 2012, out-of-school education will be gradually integrated in the general education schools. The change is in line with the new educational standards and aims to promote talent, foster stronger individualization, and provide a holistic concept of educational measures within a general education program. The aim is to increase the proportion of children taking part in such programs to 75 % by 2020. Attendance involves the payment of fees. Overall, fees are to be raised; however, half of all participants are to be exempt from paying fees. Efforts are being made to increase the salaries for staff and to expand technology-related aspects.

40.3.5 Basic (NPO) and Secondary Vocational Education (SPO)

Since 1990, the NPO has been in continual decline. The number of facilities has fallen from 3,900 in 2000 to 2,040 in 2011, with the number of pupils down from 1.65 million to 929,000 in the same period. In view of these falling numbers, there is virtually no competition for places, and the proportion of non-state facilities is almost negligible. In 2009, 9.8 % of vocational pupils attended an one to one-and-a-half-year training course without completing their secondary education. This was achieved by 78 % of pupils, while 12.6 % had already finished. The number of early school leavers remained high. In contrast, there was an increase in the number of pupils completing their training either in vocational secondary education or at university, even though many finished their training at evening school. Just under a quarter of all NPO, day facilities at the end of the 1990s were vocational lyceums. The large number (1,200) of occupations with special NPO training courses was reduced to just under 300 integrated occupations which have been subdivided into a larger number of specializations. In the meantime, work has started on the third generation of education standards, which feature federal, regional, and local components, set out the basic knowledge and skills to be acquired. Amounting to a quarter or a third of total course time, the contents of the general education courses have a vocational focus. The officially propagated merger of NPO training with SPO in a two–three-level system of nonuniversity professional training, which has in part already been completed, is not without its controversy, in particular given the social concerns relating to the closure of vocational schools in economically fragile regions. In view of the dearth of materials in many schools and vocational profiles offered that fail to meet relevant needs, regional training centers have recently been set up.

With 2,900 secondary vocational education facilities and 2.1 million learners (2011), the overall trend is stable. Two hundred and sixty (8.9 %) of the facilities are not state-run institutions. Back in 2002, 250 facilities merged as departments, or in another administrative form, with universities. This has increased significantly since then. In 2009, there were 1,347 state colleges with 1.05 million learners, i.e., 52 % were of this new type of institution. Traditionally, most training is provided in the fields of education and health. In recent years, the occupations requiring training courses were expanded to include more demanding occupations such as the social sector, services, and IT. In a downward trend, 27.2 % of pupils paid for their training in the state-run sector themselves in 2011. In the same year, 5 % of pupils had their training paid for by private companies. The number of learners in this system is often represented per 10,000 of a population. In 2011, only 64 pupils per 10,000 population attended NPO training; in the state-run training sector there were 146 pupils and in the tertiary sector 454 students per 10,000 inhabitants. As a proportion to 10,000 workers, the number increased to 76 (NPO), 176 (SPO), and 213 (university).

40.3.6 Higher Education

The number of higher education institutions has more than doubled from 514 in 1990 to 1,080 in 2011; of these 446 (41.2 %) were private institutions. In addition, sometimes there were up to 3,000 smaller learning centers or associates in other regions and cities which increase university income. Since the low point in 1993–1994, the number of students has more than doubled to over 6.490 million (state sector: 5,454), and the ratio of students per 10,000 inhabitants has risen from 219 in 1980 to 454 in 2011. In view of the ongoing decline in matriculated pupils, the numbers of new students in daytime or direct courses have fallen since 2007. The ceiling of 25 % fee-paying students per university set by the Ministry of Education in the 1990s was always substantially exceeded and has now risen to 45 %. In 2011, however, it stood at 57.7 % with the trend rising. Private institutions of higher education may demand enrolment fees of several thousand dollars a year. State control of the qualifications provided is being tightened up in this as well as in the state sector in order to eliminate both fraudulent offers of certificates and qualitatively inadequate courses.

Besides the introduction of bachelor and master programs (four and two years of study, respectively), changes in the structure of higher education have been progressing. In addition, universities are increasingly integrating facilities from other stages of education, such as gymnasiums, lyceums, and other secondary vocational education schools. In the light of international as well as domestic competition, the tiered system of higher education is also making advances. Alongside the two top universities which enjoy a special status and the newly established business schools (2006/2007), eight federal universities have been established (2011), whose aim is to generate significant national research and educational potential by merging several regional universities. Since then, 29 national research

universities have been established and specialized in developments in high technology, especially nuclear research, biomedicine, but also economics (such as the renowned business school in Moscow). Proposals drafted by the Ministry of Education to cut substantially the number of state universities have since been withdrawn. Ranking lists reveal a large number of institutions of poorer quality where reorganization or even closure would appear necessary. Proposals have been presented concerning regions that have other smaller universities in addition to the federal universities, whereby the former are to serve as institutes specializing in specific activities to cover regional employment needs, possibly concentrating only on bachelor programs. Other considerations concern the unilateral preference of certain disciplines – particularly economics and law – and the significant difference between the field of study and the subsequent choice of profession.

40.4 Developments in the Current School System

Current reforms in education have preceded eventful political effort, which has included corrective measures (EGÉ, university study in line with the Bologna Process), as well as the renewal of projects initiated back in the 2000s (school standards, profile programs, restructuring of vocational education). This development is reflected in the Education Act of 2012 which itself was preceded by a two-year discussion in relevant committees and in the electronic media. Although the Act primarily serves to rectify contradictions and overlaps arising in law, it also picks up the debate concerning structural, contextual, and procedural issues relating to the future development of the education system. However, similar to its predecessor in 1992, the Act only provides framework provisions and fails to provide final decisions.

40.4.1 System Structure and Transfer

Although key reforms in the system structure have been instigated – extending compulsory schooling to eleven years (2007) and introducing the two-tiered system of university degrees (2009) – other changes have also been made. These are partially the result of local initiatives in educational practice that have been acted on, elaborated, and applied in a wider sense.

In preschool education, the focus has been on developing quality, with private facilities also included in measures. In future, this level of education is to be seen as an integral part of the concept of lifelong learning, and the core element, in contrast to additional care services, is to remain free of charge. Plans continue on staggering means-tested parental contributions, including benefits for low-earning families. One of the focal points of compulsory schooling relates to measures to promote the teaching of gifted children, while another focuses on financial support to children from lower-educated families. Discussions also include the

institutional integration of out-of-school activities in the school. Ultimately, this aims to reduce the number of early school leavers, but excludes pupils that fail to meet agreed learning objectives. Once again, debates are picking up on a task that was repeatedly unresolved during Soviet times, that of differentiating upper secondary education (opening up individual education profiles), focusing on pupils' wishes and aligning education to meet professional requirements.

The Education Act does not envisage an independent NPO. In a bid to increase the appeal and effectiveness of this level, it will be assigned to the SPO. In future, these facilities will serve as multifunctional centers offering training for higher qualified employees in addition to training specialists at middle levels. This is picking up on a trend in educational practice of transferring lower secondary education qualifications to vocational education instead of general education schools. This path was in favor in the 1980s. The appeal for pupils also lies in the fact that qualifications can be acquired circumventing the controversial EGĚ. Payments of fees (in 2011, 27.2 % of SPO pupils started their training as fee payers) are to be expanded, while entrance examinations, particularly favored by colleges, are to be withdrawn.

Corrections have been made to the rigid understanding of competition which had an increasing impact on access to the education system and to transparency within it. The widespread deployment of ineligible entrance exams is a problem as is the removal of local catchment areas, repeatedly criticized by parents. Country schools and vocational schools have been particularly hit by the pressure from administrative bodies to close facilities – because of the decline in pupil numbers, or because of quality issues, but primarily for cost reasons. In future, to meet the needs of the population, school and university networks are to be restructured increasingly in the form of mergers instead of closures. Facilities are being encouraged to form networks, with the aim of developing best practice methods. Ultimately, “weaker” schools will be assisted with state support instead of closed. However, in view of the uncertainty of the fate of students, mainly though because of the objections and loss of face of those involved, university closures – largely due to quality deficiencies – are highly controversial and rarely happen.

It is still an open question what the effects of the newly created hierarchy within higher education will be. To highlight national competition and local role models, federal universities have been awarded a privileged status which should have an effect on local competition. Decisions have not yet been made concerning the function of the remaining often smaller regional universities. Proposals to focus these stronger on the needs of local employees target the shortage of specialists with middle-level “applied” qualifications in contrast to a glaring abundance of theoretically trained university graduates. As diversified at the concepts for restructuring vocational and academic training may be, they are highly disputed by those involved, particularly from universities afraid of losing their status. Diverse are also proposals to minimize the huge discrepancies between university qualification and later employment – no more blatant than in colleges of education. Recourse to the Soviet nature of assigning jobs or having compulsory service after graduation has been given the thumbs down; material incentives are again

being discussed, including an obligation to repay university fees if students enter employment not within their field of study.

40.4.2 Curriculum and Standards

The recently agreed federal education standards for schools once again broke with the idea that all school leavers have to pass through a universal largely uniform basic program. Since the political reforms, timetables and curricula have contained new disciplines such as economics, law, environmental protection, IT, and, since 1999, compulsory preparation for military service. The aims of upper level of secondary education include the concept of profile tracks, which, given the year-by-year introduction of the standard, will only be readily available from 2018. From then only six subjects will be compulsory in Years 10 and 11: Russian language and literature, mathematics, a foreign language, history (the course “Russia and the World”), civil protection, and sports. Proposals leading to a larger differentiation of required options based on basic or specialized courses or on humanities, technology, or natural sciences were rejected. The path chosen aims to create a leeway for meeting the needs of society, including personal educational interests; the traditional focus of secondary schooling as a preparatory phase for university study has not yet been questioned. On the one hand, the lack of organizational options has handcuffed schools and generated bottlenecks, on the other, there is a unilateral preference among pupils to choose subjects that promise good grades; at EGĖ, this is social studies, for example.

Further developments are largely determined by the high targets the government has set to promote Russia’s achievement and increase its ranking in international studies, such as PISA in 2016 and TIMS and PIRLS in 2017. These are set to break with the long-standing tradition of school education such as overloading the education program with material from the traditional “fundamentals of science” and reproductive learning. The realignment targets the acquisition of application skills and key qualifications. Instead of the previous focus on the input of prescribed content, result-based learning and a focus on output are central.

Discussions on the concept of competence, triggered by the PISA studies, are no longer straightforward. Alongside issues of content, one of the benefits has been the change in procedure used to compile standards. This has involved drawing up several drafts based on public discussion as well as including the opinions of the teaching staff and nonspecialists (in other words, standards as a memorandum of partnership with the state). This has already met with some objection – especially that the previous division of the curriculum in a federal and a regional component and components determined by the individual school will end. Looking beyond the fact that, in practice, lessons are still in part given using fully obsolete textbooks, continuing to oblige schools to compile their own curricula and syllabi by involving the teaching staff appears to be an excessive strain. As a consequence, the federal education standard also envisages offering sample curricula as a compromise solution. In view of the humanities content, there is no shortage of criticism from the

educational public, especially concerning literature and history courses. President Putin's most recent stipulation of using only one single mandatory history book has met with considerable protest. This has now been modified somewhat in that all textbooks on a mandatory list have to bound to indisputable facts and their appropriate interpretations. This particular conflict has gained additional weight given the recent policy move toward promoting the cultures, native tongues, and the respective histories on non-Russian peoples in the country. In the guise of increased support for national special rights and interests of the respective indigenous groups, this could meet with increased controls and ultimately to limiting their previous efforts.

The inclusion of religious content in schools' education standards, a module "Spiritual-Moral Culture" was developed by the Orthodox Church and has been in trial since 2008. Supplemented by three other religious beliefs native to Russia (Islam, Judaism, and Buddhism) and educational modules "Cultures of World Religions" and "Fundamentals of Secular Ethics," a new school subject has been introduced that comprises these six required options (2012). Although the courses are supposed to be culturally based and exclude religious indoctrination, by limiting the courses to Years 4 and 5 as is envisaged, this may prove problematic in the practical implementation. In many places, parental and pupil choice is restricted to secular ethics, but the course on orthodox religion was also popular. However, the involvement of the religious communities in the selection of teaching staff, the approval of curricula and teaching materials, and in the theological part of teacher training, all of which is provided for in the Education Act, remains contentious. This right, which the Orthodox Church in particular is entitled to exercise, runs counter to the separation of state and church warranted in the constitution.

40.4.3 Assessment and Qualifications

The Soviet tradition of "tidying up" test scores as needed has not only survived, the selection function of school-based marks and certificates has in fact gained in importance. New approaches (e.g., doing without marks in the first year of school) have to face a growing array of performance indicators and some partially unapproved entrance examinations. Flexible and individualized forms of recording achievement that have been justified on educational grounds are once again attracting attention especially since the central EGÉ exam has become compulsory (2009). Besides Russian and mathematics as obligatory exam subjects, pupils choose from a list of twelve other subjects (including several foreign languages) that later form the basis for study profile. The exam is hotly disputed among the professional community and across the whole of society. In particular, objection has been raised about the use of tests in literature and history to the extent the marks achieved in schoolwork are to be included in the final mark. In addition there have been mishaps and scandals such as when all exam questions were published in the internet in advance (2013) and numerous other irregularities. Widespread bribery and fraud were also uncovered after a series of regions where pupils with top marks

reached excessive levels. Families and pupils, the schools themselves, and even local and regional administrative authorities may well be found responsible for this and held to account. Consequently, the combined effects of a range of factors meant that the exam was not able to increase student access to universities and courses of their choice to the extent hoped for. There is also objection on the part of the universities. The most privileged of these were still able, to a limited extent, to choose the students they wanted. The recently introduced regulation entitling winners of traditional competitions, or subject Olympics, to take part in the EGE quickly proved to be problematic; in many places, new school competitions were set up but standards were not verified and were dubious on a number of counts.

Regardless of the regulations provided in the Education Act, serious administrative and technical problems inherent in the EGE now make it necessary to instigate radical change – including setting up an independent exam center that involves the wider society (there have already been a limited number of external observers). There are also proposals suggesting that the EGE should only be offered on a voluntary basis to pupils who wish to attend university, while other school leavers could receive the previous school leaving certificate. While corruption seems to be shifting from universities to schools, critical voices are expecting a resurgence in business for fee-charging tutors to prepare students for their final exams. Observations from educational practice substantiate general fears that EGE constraints will limit the options available to schools, teachers, and pupils and that hamper any creativity required to work through a planned curriculum. This can only lead to the dilution of the school's educational mandate and the curtailing of fairness in education.

40.5 New Developments

In its effort to boost the international competitiveness of its education system, Russia can build on past achievements as reflected in the high rate of throughput in secondary education and the recent successes in international comparisons of school performance as highlighted in the PIRLS study of reading skills and the latest IEA study of achievement in mathematics and natural sciences. However, the premises for the ambitious goals set in President Putin's third term of office and the related prerequisites for securing an upturn in reform activities have deteriorated, not improved, in the last decade. Key issues in this regard include educational funding, ethnic-national integration, cushioning social hardships in view of economic disadvantage, and the growing asymmetry between the structure of qualifications and the needs of the labor market. While on the one hand, people are questioning the economic efficiency of the whole system, there is also growing dissatisfaction with the quality and fairness of education as mirrored in repeated protests from the educated urban middle class.

Given the slowdown in economic trends, there is unlikely to be any leeway in funding planned project (growth forecast for GDP in 2013: 1.8 %). Experts have already cast doubt on any further increase in the proportion of GDP allocated to

education so important in any international comparisons of educational standards. Nevertheless, the President has announced considerable financial support for social projects in education, the increase in teacher salaries, renewing school infrastructure, and financial support of low-income families, all of which is to come from the federal budget, i.e., under his aegis. However, parallel to the social cushioning, private households are expected to contribute more to the costs of schooling in line with the newly propagated notion of individualizing educational profiles (see optional out-of-school activities). In view of the organizational and educational problems in schools, it waits to be seen whether, given the target figures for the coming years, this solution will have any chance of success. Ultimately this questions the concept of free education, a concept that is still the preferred choice of the majority of the population.

Plans being pursued involve comprehensive challenges in terms of the internationally widespread pattern of restructuring the education system at upper level of secondary education, vocational education, and higher education levels. The political agenda thus include a series of substantial structural, contextual, and procedural changes which are not going to reap encouragement from the educational public and the different parties involved. While parents by and large are clinging to familiar educational programs, general education schools have been able to assert themselves, especially the NPO, in contrast to the slow development of the vocational sector. Higher education has managed to defend its traditional privileged position in education policy, particularly as the continued demand for university places has been able to fill funding gaps. For vocational education, forward-looking profiles and models cannot be expected to be implemented to any great extent, except perhaps for *tehnika* and colleges; the greater involvement of businesses – a pressing postulate of educational policy for years – has largely remained a non-event. It is not surprising therefore that far-reaching debate among experts has not led to any dedicated political decisions.

In a bid to strengthen public involvement in decision-making processes, key plans have been made available in the internet to facilitate discussion. This step has been well received (concerning the Education Act, standards, reading lists for literature), but has also given rise to protest “from the grassroots” (the inclusion of Russian literature as a mandatory subject at the upper secondary level). In the meantime, conservative, patriotic forces “from above” have been given support (the opening congress of a newly established association “Parental Resistance” featured President Putin himself). This step is an obvious counterweight to the largely civil protest movement demanding participation to safeguard the legitimation of political decisions. There have been changes in the manner in which educational projects are translated into educational practice. Not surprisingly, schools have expressed their dissatisfaction with the tightly woven system of web-based controls that has been introduced for them. This has created a somewhat ambivalent picture: on the one hand, reports cite examples of legal bodies and educational administration upholding the autonomous latitude schools have in law; on the other hand, the creative forces in education describe the tension between those who are demanding responsibility for change and the administration controlling them as a vicious circle.

This concerns the whole system of spot checks based on international models supporting the continued monitoring of performance. In order to evade the evaluations of possible administration despots and achieve greater public transparency, external people from the wider society have been included in educational processes. Nonetheless, given the traditionally inflated administration of education, problems are expected to continue. In the face of expanding corruption and legal shortcomings, the modernization of educational administration is making little progress. The recent case of a respected head teacher obviously wrongly charged with misappropriation caused a furore among educationalists who saw this as a repressive act of state violence. Some of the side effects emerging from the implementation of the new policies and their core projects in education have been the subject of complaints. This has also been the case in other countries albeit, complaints they were more pronounced in Russia, resulting perhaps from comparatively radical versions of new policy concepts which were avoided or overcome in other countries. Consequently, key issues that had been ignored for a long time are now back on the agenda. Whether the follow-up pressure announced will really accelerate implementation and yield useful results waits to be seen. In view of the continuing reluctance to accept change and “reform fatigue,” there is much to indicate that further developments in the education system will only be made in small steps. Experts are already indicating that the targeted goals, including their timing and details, have little chance of being achieved. Corrections already made to the course of educational policy, especially in the case of the highly prestigious EGĚ, uphold these expectations. Educational policy appears to be at a loss as to how best to mobilize those at the grassroots, whether to continue to strengthen the present leeway granted to schools to independently manage their own affairs to focus on controls, including potentially repressive activities. The jury is still out on whether Putin’s return to the office of the President means that authoritarian state action is likely to roll back the liberal tendencies toward modernization promulgated by his predecessor. In view of the population’s dwindling trust in educational justice and in the quality and reliability of education, the main task of politics lies in upholding the traditional, positive basic attitude toward learning and the school as an important place to grow up. The culture of knowledge and the traditions of research are also to be retained guarantees of the widely held values in Russia of education as an ideal and purpose in itself.

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Wendelin Sroka

The Republic of San Marino (*Repubblica di San Marino*), situated in the northern part of the Apennine peninsula and surrounded by Italy, has a population of around 32,500. The state language of the republic is Italian, and politics, economy, culture, and everyday life are strongly interconnected with Italy. This is also true for the area of education, which nevertheless has its specific features. The legal basis of the public school system in San Marino is formed by a number of acts, passed by the Grand and General Council (*Consiglio Grande e Generale*). Among them are the act on basic norms in instruction (*norme generali sull'istruzione*) and the act on cycles of instruction (*cicli di istruzione*), both enacted in 1998, and the act on the reorganization of departments and the modification of the structure (*Riordino delle Direzioni e modifica della struttura*), enacted in 2008. Compulsory schooling of 10 years covers primary and secondary education. Administrative responsibility for the school system rests with the State Office for Education, Culture and University (*Segreteria di Stato per l'Istruzione, la Cultura e l'Università*).

The school system of San Marino comprises six types of institutions. Education for children from 3 months to 3 years is provided for in the *Asilo Nido* (nursery). This is followed by education in the *Scuola dell'Infanzia* (infant school) which lasts 3 years. The *Scuola Elementare* (primary school) addresses 6- to 11-year-old pupils. The *Scuola Media* (middle school), equivalent to its Italian counterpart, lasts 3 years, and the *Scuola Secondaria Superiore* (upper secondary school) has 2- and 3-year programs. These programs lead to the *Diploma di Maturità*, allowing pupils to take up studies at tertiary level. School-based programs of vocational training are offered by the *Centro di Formazione Professionale* (center for vocational training).

In general, instruction in Sammarese schools follows the Italian curriculum. Special attention is paid to foreign language instruction, beginning with English in Year 3 and supplemented by French in Year 6. Teachers employed in the

W. Sroka (✉)

Deutsches Zentrum für Luft- und Raumfahrt, Bonn, Germany

Sammarese school system receive their initial training at universities in Italy. Currently, nearly all pupils learn at school at least until the age of 18, be it in San Marino or abroad. A great number of Sammarese young people continue their secondary or tertiary level education in Italy. The government of San Marino provides financial support to these students.

The University of San Marino (*Università degli Studi della Repubblica di San Marino*), established in 1985, offers graduate and postgraduate studies in Italian and English in a selection of subjects, including business administration, economics, law, history, and education. The university also serves as an adult education center and as a provider of in-service training for Sammarese teachers.

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Vera Spasenović, Emina Hebib, and Slavica Maksić

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V. Spasenović (✉) • E. Hebib
University of Belgrade, Belgrade, Serbia

S. Maksić
Institute for Educational Research, Belgrade, Serbia

42.1 History and Social Parameters of the Education System

42.1.1 Cornerstones of the Historical Development

Conditions for literacy development among the Serbs were created by accepting Christianity and developing the Slavic language in the form of Cyrillic in the ninth century. The earliest Serbian schools originate from the Middle Ages and were established at monasteries which represented the centers of literacy, especially in the period of creating the independent Serbian state (twelfth century). There were schools at courts for noblemen's children whose teachers were clergy or secular people. In the eighteenth century, the first teacher training school, grammar school, theological school, and other schools were established on the territory of today's north Serbian province of Vojvodina. The first school constitution was adopted in 1833, and soon after that, curricula were adopted, as well as the general law on schools, within which special laws were published (for primary schools, trade schools, grammar school, and lyceum). Compulsory 6-year education for children of both sexes was envisaged by the 1882 law, but at the end of the nineteenth century only one-fifth of children attended school (Ilić 2005).

In the first half of the twentieth century, the system of public schools was developed. It included nurseries, primary schools (4 years), higher primary schools (4 years), schools for underdeveloped children, and institutions for the general enlightenment of the nation. In public schools, which were state institutions, teaching was general and free. After primary school, it was possible to continue education in a civil, secondary, or vocational school. University was the highest educational institution and those who passed the *matura* (matriculation) examination in grammar schools, as well as in vocational schools, could enroll.

The period after World War II is characterized by the struggle against population illiteracy, the introduction of compulsory 7-year education, and the opening of a number of vocational schools for the country's industrialization needs. In 1958, primary school was made compulsory for all children and it lasted for 8 years. At the time, different profiles were introduced to general secondary schools (*gymnasia*), and the development of secondary vocational schools, as well as of high and higher schools, was encouraged. The network of workers' and people's universities was expanded and the adult education system was organized. Thus, in 1960, 80 % of the population was included in primary education.

In the period from 1974 onward, the reorganization of secondary education in Serbia was initiated and the "secondary profession-oriented education" system was introduced, which implied the abolition of *gymnasia* and the gradual specialization of secondary school students within a specific sector. The Ministry of Education adopted curricula, while schools were obliged to implement them. A wide network of educational institutions was created, the number of teaching and professional staff increased, and education was one of the priorities within the state system.

Serbia

		PhD study			Grade	Age
	Graduate academic study	Specialist academic study	Specialist professional study		17	23
					16	22
	Basic academic study		Basic professional study		15	21
					14	20
					13	19
	General secondary school	Secondary vocational education	Vocational school		12	18
						11
					10	16
					9	15
	(Second cycle)				8	14
						7
	Primary education				6	12
						5
	(First cycle)				4	10
						3
					2	8
					1	7
	Preparatory pre-school programs (min. 6 month)					6
	Kindergarten					5
	Nursery					3

42.1.2 Relevant Stages of Educational Reform and Innovation Measures

During the last decade of the twentieth century, the country faced a major social crisis that comprised the dissolution of the Yugoslav federation, armed conflicts, diminished and negative economic growth, disruption and privatization of large economic systems, inflation and the decline of living standards, increased unemployment, the brain drain of a large number of highly educated young people to the more developed and stable countries, and a shift in the value system, including giving up socialist ideals, an increase of anomie, and the lack of individual safety.

In such circumstances, education no longer enjoyed policy priority and changes within the education sector were limited in scope and intensity. The structural and organizational changes were related to the abolition of the secondary profession-oriented education system and reintroduction of gymnasias and secondary vocational schools. Clearer state control in the domain of establishment and regulation and funding of educational institutions, on the one hand, as well as gradual privatization in the field of education, on the other hand, made up the essence of change in school governance. Changes in the program's basis of schoolwork were focused on modifying the existing curricula in order to reduce the level of ideologization of learning content.

A more comprehensive education system reform was initiated after 2000 when there was a change in political power in Serbia which saw the launch of numerous reforms in various segments of social life, including of education. The process of restructuring and modernizing the Serbian education system commenced, and it was expected to contribute to the successful economic recovery of the country, democratic development, and the international integration of the country (Kovač-Cerović and Levkov 2002). The three reform objectives were defined: democratization, decentralization, and professionalization of education.

The most significant educational changes that have since been initiated or accomplished include: (a) changes in the school system management (national councils have been formed in order to monitor the situation, the development of an improvement in the quality of education; competencies of the Ministry of Education, regional governmental bodies, and local school management have been redefined); (b) structural changes at different educational levels (compulsory education has been expanded to a year preceding the primary school enrollment; primary education curricula have been reformed; higher education continues to be adjusted to fit the principles of the Bologna Process, etc.); (c) changes aimed at increasing the democratization and openness of the school system (an inclusive approach to education, more autonomy of schools and teachers, as well as more participation of parents and local community in managing the schoolwork); and (d) changes in providing and improving the quality of education (standardization in education; external evaluation of students' achievements and school self-evaluation; defining procedures for obtaining teachers' working licenses; mandatory professional training of teachers, etc.) (Hebib and Spasenović 2011).

42.1.3 Sociopolitical, Socioeconomic, and Sociocultural Context Conditions of the Education System

The population of Serbia is slightly above 7.2 million, with more than half living in towns and cities (Statistical Office 2012). Serbs are the most numerous ethnic group (82.9 %), followed by Hungarians, Bosniaks, Roma, etc. Most of the population is of Orthodox faith, but the society is multi-confessional and multiethnic.

In terms of the educational structure of the working population (15–64 years), 22.6 % have completed an 8-year primary education, 48.5 % have completed secondary education, and 13 % have completed tertiary education. Unemployment has been growing rapidly in recent years and currently exceeds 22 %. Teachers make 6.1 % of the total number of employees. As for the teaching staff, 54 % work in primary education, 31 % in secondary, and 15 % in tertiary. Teachers are prevalently female, a tendency most pronounced at preschool and the first cycle of primary education. Teacher salaries are about the average in the social sector.

42.2 Fundamentals, Organization, and Governance of the Education System

42.2.1 Legislative Framework

Preschool, primary, and secondary education are regulated by the Law on the Fundamentals of the Education System (Zakon o osnovama sistema obrazovanja i vaspitanja 2009), whereas higher education is regulated by the Law on Higher Education (Zakon o visokom obrazovanju 2005). The Law on the Fundamentals of the Education System represents an umbrella law on the basis of which specific legal documents are adopted for individual education levels. In addition to the basic provisions, among which are the defined principles, general objectives, outcomes, and standards of education, the Law on the Fundamentals of the Education System consists of the following sections: education quality development (jurisdiction and scope of work of administrative bodies and professional institutions in the field of education); types of institutions in the field of education; programs and modes of delivery of education and examinations; rights, obligations, and responsibilities of a child and a student; requirements for employment in the field of education; rights, obligations, and responsibilities of teachers and others employed in education; supervision over the work of institutions; and financing education.

The general objectives of education, as defined by the Law on the Fundamentals of the Education System, target the full intellectual, emotional, social, moral, and physical development of a child and a pupil; the acquisition of high-quality knowledge and skills and the formation of value attitudes; the development of linguistic, mathematical, scientific, artistic, cultural, technical, and computer (IT) literacy; the development of key competences needed for life in modern society; training for work and occupation by developing vocational competences; the development of abilities for the role of a responsible citizen, for a life in a

democratically organized humane society based on the respect for human and civil rights; the development of personal and national identities; respecting and cherishing the tradition and culture of the Serbian people, ethnic minorities, and ethnic communities; and the development of multiculturalism and respect for racial, ethnic, cultural, linguistic, religious, gender, sex and age equality, tolerance, and appreciation of diversity.

The Law on Higher Education regulates the activities, principles, and objectives of higher education; quality assurance of higher education (jurisdiction and scope of work of the National Council for Higher Education); types of higher education institutions and study programs; teachers' work (teacher titles, requirements for obtaining titles, rights and obligations, etc.); students, their rights and obligations; study modes; financing of work of higher education institutions; and supervision over the work of higher education institutions.

In addition to the above legal documents, there are other laws in the field of education which regulate important issues in the field of education (e.g., *Zakon o predškolskom vaspitanju i obrazovanju* 2010), such as laws on textbooks and pupil standards.

42.2.2 Governance of the Education System

Governance and management of the Serbian education system are performed on a variety of levels: national, regional, municipal, and institutional. In addition to administrative and managing bodies, professional institutions responsible for performing certain professional activities in the field of education are established and operate on certain governance levels.

In order to monitor and allow for the development and improvement of education quality on the national level, the following bodies have been established: the National Education Council (for preschool, primary, and secondary general and art education); the Council for Vocational Education and Adult Education; and the National Council for Higher Education. The Councils monitor and analyze the state of education in accordance with their jurisdiction; determine courses of development and improvement of education quality; participate in the elaboration and preparation of the education development policy and strategy; establish standards in education; adopt education programs; and give opinions and suggestions to the responsible ministry in the process of adopting legal regulations for the field of education.

The responsible state body for the field of education is the Ministry of Education, Science, and Technological Development. The Ministry ensures the functioning of the education system in line with the general principles and objectives of education, that is, it plans and monitors the development of education; supervises the work of educational institutions and professional institutions; organizes the professional development of employees; establishes international cooperation regarding the development of the education system, etc. At the regional level, the Ministry establishes its organizational units – Regional School Departments – responsible for conducting professional and pedagogical supervision and providing support to development planning and quality assurance of work of institutions.

To carry out developmental and advisory research and other professional activities in preschool, primary, and secondary education, the state has established the Institute for Improvement of Education and the Institute for Education Quality and Evaluation.

The governing body in a preschool institution is the governing board; in schools, the school board; and at the faculty level, a council. The governing bodies in preschool institutions and schools are composed of representatives of employees, parents, and local authorities. They adopt legal documents of the institution, programs and development work plans, reports on their implementation, and the financial plan. Directors of institutions directly manage the work of institutions and are responsible for compliance and the successful performance of the institution's activities. The advisory body in school institutions is the Parents Council which makes suggestions and proposals for improving educational work.

Supervision over the work of educational institutions is carried out by the competent Ministry in the form of inspection and professional and pedagogical supervision. Inspection supervision, carried out by municipal, i.e., city/town, administration, examines compliance with laws and regulations. Professional and pedagogical supervision is aimed at the institutions' work and quality evaluation and providing help and support to employees in the institution.

42.2.3 Funding the Education System

Educational institutions in Serbia are mostly state owned, from preschool to university levels. State-owned educational institutions are funded from public resources, i.e., mainly from the Republic's budget, and to a smaller degree from the support of respective municipalities. The initiated process of decentralization of education implies greater participation by the local community in funding education, but that process is still difficult to implement in practice. For example, it is estimated that at the primary education level over the last few years, nearly 90 % of the overall resources for funding primary education were provided out of the state budget, whereas more than 10 % were provided from the municipality budgets. The total expenditure on education in Serbia is lower than the OECD average and over the last few years has ranged from 4 % to 5 % of GDP (Government of Serbia 2011). Of the total, the proportions of monies assigned to primary, secondary, and higher education are 47 %, 24 %, and 27 %, respectively. Itemized total public expenditure (ISCED 1, 2, 3, 4) shows that a lion's share goes to salaries and wages (about 95 %).

42.2.4 Private Sectors in Education

The private sector in the Serbian education is generally poorly developed, except at the higher education level. The establishment of private primary schools has been allowed since 2003, but there are still few of them. There are 33 private secondary

schools, and private institutions for higher education attract 15 % of all students in the country (Government of Serbia 2011). Private educational institutions are financed entirely from their own resources.

42.2.5 System of Quality Management and Support of Educational Establishments

Education quality assurance and development, as one of the key objectives of the current education reform in Serbia, is achieved by standardization in the field of education and through the development of an evaluation system in education. Standardization in education takes place in three segments: standardization of conditions under which educational work is carried out, standardization of the characteristics of a high-quality educational process, and standardization of the outcomes of education.

In the area of standardization of the characteristics of the high-quality process and outcomes of educational work, significant results were achieved over the past few years. The documents defining the standards for the end of compulsory education were adopted, as well as standards for textbook quality, standards for teacher competences, standards for the work quality of educational institutions, and standards for the competences of heads of educational institutions. Evaluation within the education system of Serbia is conducted on the basis of the defined educational standards. In addition to the efforts to improve school assessment (since 2003/2004, the combination of descriptive and numerical assessments has been in use), the introduction of final examinations at the end of primary and secondary education and conducting evaluative research of students' achievements are of particular importance to monitoring work and the development of students as an important segment of evaluation in education. Evaluative researches of students' achievements are carried out through national testing of students in the Serbian language and mathematics and through participating in international research of the primary and secondary school students' academic achievement and competencies, such as the Program for International Student Assessment¹ (PISA) and Trends in International Mathematics and Science Study² (TIMSS) (Serbia has been participating in these projects since 2003).

The restructuring of services for the supervision of the work of institutions and the affirmation of the concept and practice of self-evaluation have been of particular significance for evaluating preschool teachers, teachers, and other professionals in the field of education (carried out as part of the external evaluation of institutions and self-evaluation process) (Hebib et al. 2011). Inspection supervision (control over the compliance of institutions) was separated from professional and pedagogical supervision over the schoolwork. In this way, conditions were created for the

¹www.oecd.org/pisa

²www.timssandpirls.bc.edu

state bodies in charge of education to provide, via their pedagogical supervisors, advisory help and professional support to teachers and school counselors in the preparation and implementation of educational work, quality assurance of processes and results of education, and professional development. School self-evaluation has been highlighted as one of the key domains of the evaluation system in the education system. In order to develop the concept of school self-evaluation, indicators of schoolwork quality were defined and procedures and instruments developed for use in the assessment of schoolwork quality.

42.3 Overview of the Structure of the Education System

The structure of the education system consists of: preschool, primary, secondary, and higher education. In line with the legal provisions, all these aspects make up an integral part of the overall lifelong learning of all citizens in the Republic of Serbia.

42.3.1 Preschool Education

Preschool education (ISCED 0) is implemented in preschool institutions comprised of nurseries (for children under 3 years of age) and kindergartens (for children from 3 years of age to school starting age). A preparatory preschool program, as a program to prepare pupils for primary school, has been compulsory since 2006/2007 for children between 5.5 and 6.5 years of age. The preparatory program lasts for 4 h per day over the course of 9 months. In the future, the mandatory preparatory preschool program could serve as a realistic solution for extending compulsory education to 9 years. The total coverage of children with preschool education in 2010/2011 was 52 %, while the preparatory preschool program was attended by 88 % of children (Statistical Office 2012). Work with children is organized in educational groups based on a full-day or half-day basis. Parents share the expenses of attending preschool institutions, while the preparatory preschool program is free.

42.3.2 Primary Education

Primary education (ISCED 1 and ISCED 2) is comprehensive and organized within a single structure. It is compulsory and lasts for 8 years. It is implemented in primary school through two cycles: class teaching from Years 1–4 and subject teaching from Years 5–8. Each child who turns a minimum of 6 1/2 and a maximum of 7 1/2 years of age by the beginning of an academic year is enrolled in Year 1 of primary school. After a medical examination, at enrollment a school counselor (a school pedagogue or a school psychologist) determines the physical, intellectual, and socio-emotional maturity of the child for school.

The curriculum, adopted by the National Education Council, is the basis for approval of the school program, which is developed and adopted at the school level

for the period of 4 years. The current curricula for primary education were adopted in the period from 2004 to 2010. The curriculum defines compulsory and elective subjects, as well as other forms of pedagogical and educational work, their distribution across the school years and annual and weekly lesson time, teaching objectives of individual subjects, teaching contents, as well as guidelines for program delivery.

The total annual number of lessons in Year 1 of primary school (7-year-olds) for compulsory and elective subjects is 756 lessons and for students in Year 8 (14-year-olds) 1,054 lessons. The compulsory subjects at the beginning of education are the pupil's mother tongue, a foreign language, mathematics, the world around us (nature and society), arts, music, and physical education. This list is extended for Year 8 pupils to include biology, physics, chemistry, geography (instead of the integrated subject on nature and society), and technical and IT education. During the first cycle of primary education (Years 1–4), pupils study two elective subjects, one of which has to be either religious education or civic education, while the other is selected from the list of elective subjects offered by the school. In the second cycle, another foreign language and sports are added to the list of elective subjects.

The network of primary schools is highly developed, but it is uneven in relation to the influx of students in some areas (3,512 primary schools as individual functional units). In villages, where there are few children, there are often 4-year primary schools with combined classes (one teacher works with students of different ages in different years). The number of students per teacher in primary school is 11.8, and the average number of students in the class is 20.2 students (Pešikan 2012).

Teaching for ethnic minorities is organized in their mother tongue, bilingually or in the Serbian language, where the mother tongue is studied in parallel with elements of the culture of the given minority. Textbook publishers are obliged to print textbooks in all languages in which teaching is delivered.

42.3.3 Secondary Education

Secondary education (ISCED 3), intended for pupils of 15–19 years of age, is selective and not compulsory. General secondary education lasts for 4 years and it is delivered in gymnasias which can be of general, sociolinguistic, natural scientific and mathematical, or IT orientation, as well as in specialized gymnasias intended for education of pupils talented in specific areas. Secondary vocational education is organized as a 3-year and 4-year education. Education in 4-year secondary vocational schools leads to further education or employment, whereas 3-year vocational education is focused on employment. Secondary vocational schools include 15 sectors with a total of 110 profiles in 3-year schools and 142 profiles in 4-year schools. The ratio of contents in 4-year educational programs is a minimum of 40 % of general and 55 % of vocational contents, whereas in 3-year schools that ratio is 30 % of general and 65 % of vocational contents. Practical lessons are taught in schools and companies. Practical skills training up to 1 year are also delivered in vocational schools, as well as education for work up to 2 years and programs of retraining and additional training.

Enrollment in secondary schools is on the basis of school performance in Years 6–8 of primary school and the score in the final examination, in the order of preference of 20 secondary school profiles pupils name in a wish list. Enrollment is centralized and there is an electronic registration and an overview of ranking lists by schools.

About three-quarters of pupils attend secondary vocational schools (Statistical Office 2012), which is significantly higher than the EU average. However, this does not mean that most of them are interested in vocational schools – it is more of a reflection of the fact that the capacities of general education schools (gymnasias) are limited, so students opt for what is available to them. For instance, although mechanical and metal schools are numerous and have a large intake of students, the interest in them and their population have declined in recent years. The exceptions are profiles in health and social care and in economics, law, and administration, which are very attractive to young people. Also, the number of students who want to enroll in 4-year vocational schools is larger than the available capacities, whereas 3-year schools have a lot more places than interested students. The reasons for this can be found in the obsolescence of certain educational profiles, especially those related to the industrial sector, and accordingly in the poor employment perspective. Art schools (music, ballet schools, etc.) are attended by approximately 2 % of students.

The capacity of secondary schools is sufficient (497 schools), but their geographical distribution is uneven, i.e., there are significant differences in the distribution of different educational profiles. The number of students per class is 25 on average, while the ratio of teacher-student is 1:11 (Pešikan 2012).

Vertical accessibility to higher education is possible for students who complete gymnasias or vocational education in 4-year profiles, whereas students in 3-year profiles have that option only in case of taking additional exams to obtain a 4-year profile diploma, which is rare in practice.

42.3.4 Higher Education

Synchronization of higher education with the Bologna Process started in 2005. The system of three-degree programs and the ECTS (European Credit Transfer and Accumulation System) were introduced, accreditation of higher education institutions and study programs was initiated, all study programs were reformed, and issues regarding students' and teachers' obligations were more precisely regulated.

Higher education system has two types of study: academic study at universities (180/240 + 120/60 ECTS) and vocational profession-oriented study (180 + 60) realized at tertiary education institutions (180 + 60 ECTS). Three levels of academic degrees are obtained at universities: a bachelor's degree, master's degree, and doctorate degree. For the first degree, it is necessary to complete 3 or 4 years of undergraduate studies (at technical faculties, 5 years, and in biomedical sciences, 5 or 6 years). Master's studies last for 1 or 2 years (60 or 120 ECTS). Doctoral studies last for 3 years (180 ECTS). Vocational profession-oriented studies have two levels: basic profession-oriented studies which last for 3 years (180 ECTS) and specialist profession-oriented studies which last for 1 year (60 ECTS).

Approximately 41 % of a cohort attend faculties and colleges with the trend growing slowly (Government of Serbia 2011). Students educated at state higher education institutions are budget funded (about two-thirds of students at basic academic or integrated studies and about one-quarter at master's studies) or self-funded.

42.4 Developments in the Current School System

42.4.1 Transition Between School Levels

Ninety-seven percent of pupils completed the 8-year compulsory education in 2009/2010. Given that primary education is implemented within the single structure, transition from the first to the second cycle of primary education, that is, from Years 4 to 5, takes place automatically. It is possible to repeat a school year, but rare in practice (in primary school it is 0.8 %), while the compulsory education dropout rate is 0.7 %. The gross enrollment rate to secondary schools is 84.4 %. In secondary education year, repetition and dropout rates are larger in 3-year (3.1 % and 7.8 %, respectively) than in 4-year profiles (1 % and 2.3 %), which can be explained by the fact that 3-year schools are generally populated by pupils with weaker achievement rates. Only 4 % of pupils are part-time (Government of Serbia 2011).

At the end of primary education, pupils take a final examination (since 2010/2011), a requirement for enrollment to secondary schools. In addition to the examination in Serbian, that is, the mother tongue and mathematics, the structure of the final examination at the end of primary education will be expanded to include natural and social sciences (which will be taken in the form of a composite test consisting of all five sciences studied in the second cycle of primary education, history, geography, biology, physics, and chemistry (Levkov 2011)).

Unlike the *matura* examination taken at the end of the 4-year general and vocational education, the new concept of general and vocational *matura* which is to be implemented from 2014/2015 envisages the results of the *matura* (external examinations) to allow for a direct path to higher academic or vocational profession-oriented studies, thus replacing entry examinations. The structure and the content of the *matura* exam are in the process of development.

42.4.2 Current Problems and Trends

Education of children with special education needs has been increasingly integrated within regular schools; since 2010, the inclusive approach to education has been implemented in preschool institutions and primary and secondary schools. Legislation envisages measures related to the adaption of achievement standards, the development of individual education plan and the provision of additional support, modes of enrollment to school, taking the final exam, and introducing a pedagogy assistant. Teachers have been trained in inclusive education, handbooks and guides for the improvement of inclusive practice have been published, and some schools

have been allocated a pedagogy assistant, as well as equipment needed for work with children with disabilities. Although at the education policy level Serbia has accepted a more modern and humane inclusive approach to education, practical experience of educational institutions points to numerous problems in the implementation of inclusive practice (Spasenović and Maksić 2013).

Secondary vocational education is characterized by specific reforms designed and implemented within EU VET Reform Program. In December 2006, the Government of the Republic of Serbia adopted the Strategy for the Development of Vocational Education and Training, according to which the most significant issues are those of development of occupations and standards, modernization of educational programs, evaluation and certification, financing, vertical and horizontal mobility within the system, and further, for example, transition from a vocational to academic program or from learning to work and vice versa. New programs being piloted have been gradually systematized since 2011/2012 and have been attended by about 17 % of students. The process of reforming general secondary education is ongoing, but so far there have been no visible results. Adopting the national nomenclature of occupations is one of the most current issues of the vocational education reform.

On the level of higher education, after the reform based on the Bologna principles (Zakon o visokom obrazovanju 2005), the efficiency of studying, as seen against the average duration of studying and completion rates, i.e., dropout rates, has proven to be slightly more favorable in comparison to the period prior to the implementation of the reforms (Jarić and Vukasović 2009). However, discussions are currently taking place in academic communities on whether the increased efficiency is followed by appropriate quality of education outcomes. Mobility of students and teachers has been slightly increased over the last few years, but it is still very low.

In the field of primary adult education, significant progress has been made toward functionalization of the educational process and its outcomes, in terms of linking the contents of education with experience and needs of adults and aligning general education to future vocational training courses (in the context of contents, as well as dynamics – parallel implementation of programs of general and vocational education) (Medić et al. 2009). The most important activities within the reform of secondary vocational education of adults were focused on establishing Regional Training Centers for continuous professional (vocational) adult education, which represent units of secondary schools open to programs and responsive to economic and labor market needs. Their main activity is related to the development and implementation of vocational education programs, validation of prior learning, information, advice and guidance in training course selection, and, finally, consulting services to enterprises in the field of human resource development, occupation and skills needs analysis, etc.

In order to improve teacher competences, new legal provisions applied as of 2012 envisage that preschool teachers, as well as subject teachers in primary and secondary schools, have to acquire a master's degree diploma and obtain a minimum of 30 ECTS from the areas of psychology, pedagogy, and didactics and 6 ECTS for teaching practicum in school (totaling 36 credits), either during their studies or afterward.

42.5 New Developments

In the document *Strategy for the Development of Education in Serbia until 2020* (2012), the following items were defined as objectives of long-term education development: to increase the quality of education processes and outcomes to a maximum achievable level; to increase the coverage of the population of the Republic of Serbia at all educational levels, from preschool education to lifelong learning; to reach and sustain the relevance of education by making it compliant with the developmental needs of individuals and the social system; and to increase the efficient use of all education resources, that is, completing education on time, with a minimum extension of duration and reduction of education dropout. Specific goals of development of all education system components were defined on the basis of these objectives. In addition, the policy and strategy framework for education system development was elaborated.

In order to increase education quality in Serbia by 2020, it is necessary to: work on improving the conditions in which educational activities take place; provide and develop resources leading to education quality improvement (by increasing financial resources to be invested in education); continue the standardization process in education (based on considerations of segments of educational work which need to be standardized in order to develop a functional, stable, and sustainable education system); develop the evaluation system in education, especially the accreditation system and quality control of educational programs and institutions; develop a governance and management system in the field of education; and work on capacity building for taking responsibility for education quality, etc. The following could be highlighted as important assumptions for achieving the expected results in the abovementioned domains: development of a culture of professional responsibility among all stakeholders of the education system and educational activities; harmonization of different innovations which are being introduced in practice; and development and use of educational statistics and information system in the field of education.

Although significant results have been achieved in the field of education in Serbia after year 2000, it is difficult to predict further development in this sector, since previous experience indicates that the success in implementing reform efforts is strictly dependent on social, political, and economic changes, and these were not continually beneficial.

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B. Kosova (✉) • S. Porubsky
Mateja Bela University, Banska Bystrica, Slovakia

43.1 History and Social Parameters of the Education System

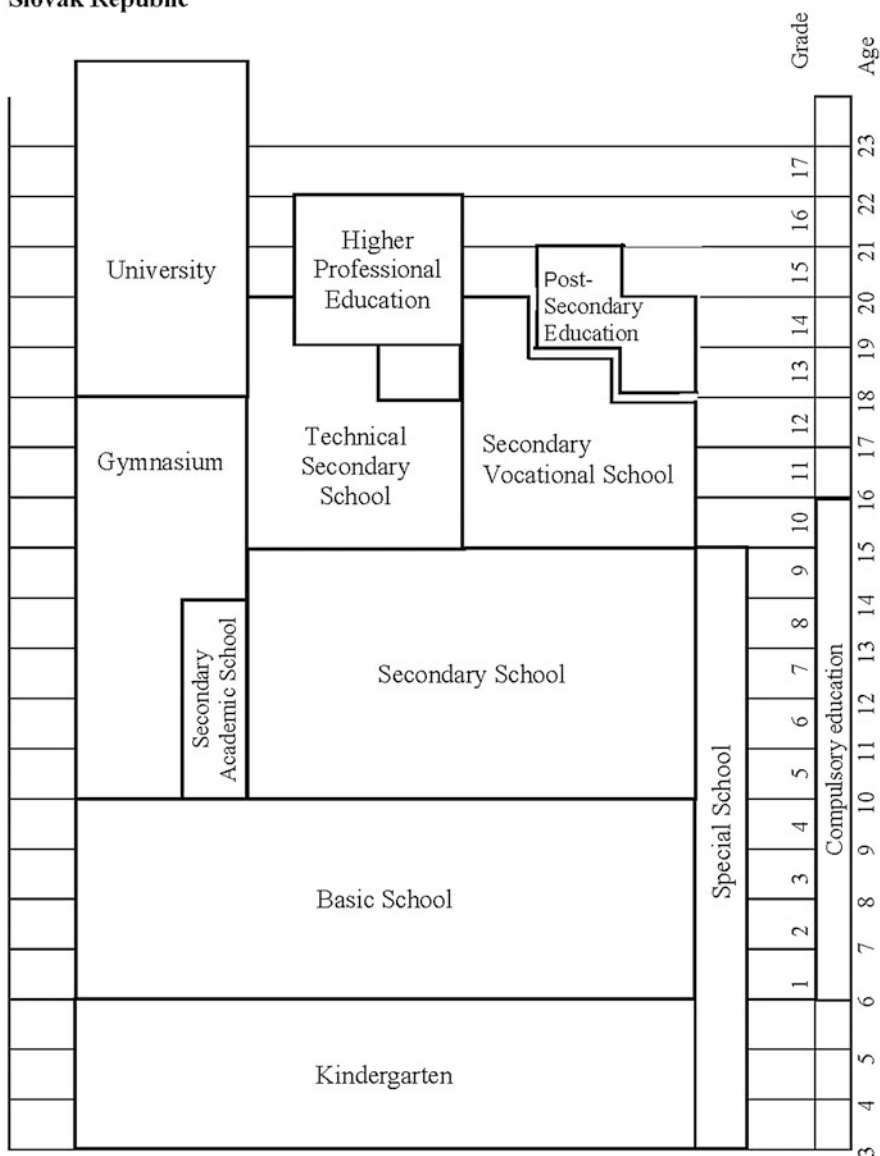
43.1.1 Cornerstones of Historical Development

The Slovak Republic became an independent state on 1 January 1993 after the peaceful dissolution of the Czech and Slovak Federation (Czechoslovakia). Slovakia had been part of Czechoslovakia since 1918. Previously, it had belonged to the historical Hungary and the Austro-Hungarian Empire. The Slavs descended from tribes that lived in Great Morava (830–908). This was home to the community of Nitra, one of the most significant cultural centers of the age where schools were also founded. Following the disintegration of Great Morava, the territory of present-day Slovakia became part of the Hungarian empire. The Slovaks became an ethnic minority: a political, economic, and cultural periphery. The Slovakian people gradually developed into a modern political, economic, and cultural unity that only came to the fore within Czechoslovakia. In 1843, a group of Slovakian intellectuals ensured that Slovakian was established as a standard language. Although this facilitated cultural development, it did meet with resistance from the authoritarian politics of the Hungarian rulers. During the Hungarian regime, the Slovak language was suppressed in the education system, nearly only being used in primary schools. A Slovakian system of primary, secondary, and higher education was only established after Czechoslovakia was established. Although the first university – the Academia Istropolitana – was established in Bratislava in 1465, during the rule of Matthias Corvinus, it closed down in 1491, and the first Slovakian university in the new state – the Comenius University in Bratislava – was opened in 1919.

During the Second World War, the Slovak Republic was proclaimed as puppet state for Hitler's Central European politics. The state was dependent upon Germany in all matters of state. The Czechoslovak state was restored in 1945, and in 1948 the Communists came to power, leaving Slovakia as a territory of interest for the Soviet Union for the next 40 years. Although attempts were made at the end of the 1960s to democratize the state, these were crushed by the Soviet Union and its allies in 1968. A year later – in line with the goals of pro-Soviet Slovak politicians – Czechoslovakia became a federation of the Czech and Slovak Republics. However, the Communist Party did not take too kindly to the principle of federalism, choosing instead to exercise its centralist political ideology. This was also reflected in the education system: although the two federal republics formally existed side by side, in reality they were strongly influenced by the central Communist government.

The demise of Communism in Czechoslovakia in 1989 enabled fundamental political, social, and cultural change to take place, and the country adopted a democratic market economy. The political and ideological prerogative of the Communist Party encoded in the country's constitution was abolished, and far-reaching consequences were also felt in the education system. A group of political leaders expressed their desire for an independent Slovak state. Growing political pressure led to a peaceful and orderly dissolution of Czechoslovakia within a legal framework.

Slovak Republic



43.1.2 Reform and Innovation in the Last 30 Years

By and large, the consequences of the political upheavals following 1989 in the former Czechoslovakia were similar to those in other post-Communist states in the region. Most of all, the political and economic supremacy of the Communist Party

was rethought. The change process was consequentially transferred to the education system. Though the formal structure that had developed between 1948 and 1989 was retained, from 1990 some fundamental changes were made to the syllabi of subjects advanced by Communist ideology.

In 1990, a spontaneous process of democratization of schools began to roll: teachers, other staff, and pupils began to select their school management, and spontaneous self-administration bodies were set up at schools and universities. This created the conditions for a systematic legal elaboration of Slovakia's future education system. In 1990, the Ministry of Education published a document entitled "Of the Spirit of Schools." Some of the notions formulated in the document were partially implemented in law. Overall, however, the document enjoyed little resonance from the political decision-makers.

In 1994, the Ministry of Education triggered a public debate on strategy which resulted in the project paper "Konštantín." This formulated a vision of how the education system in Slovakia would develop on the next 10 years, in particular exploring what would have to be done to come close to European standards of quality and quantity in education. Accordingly, the number of pupils leaving secondary education should be increased; the number of students admitted to university study and the number of students graduating should also increase. The project was very ambitious, and in some regions the results were not very convincing given the economic situation and the political upheavals of the time. The most respected aspect of the project was a strategy paper entitled "Millennium." In 2001, the government acknowledged this as the country's national education program, and it was ratified by parliament in 2002.

The program focuses on 12 areas that describe the foundations for development over the next 10–15 years. These areas can be described as the conceptual pillars (Zelina 2005) of the national education program. These focus on rejuvenating educational research, shaping educational practice to be more humanistic (especially facilitating a more pupil-centered instruction) curricular reform, innovating educational strategy including experiential learning methods, decentralizing school administration and management, making teacher training more professional, funding schools, building up a network of institutions to support schools, intensively implementing information and communications technologies at schools, improving the quality of foreign language teaching, generating flexibility in secondary schools in respect of practical needs and increasing motivation for lifelong learning, and creating a systematic and legislative framework for the transformation of the education system.

The implementation phase of the project proved problematic for a number of reasons. On the one hand, there was no real consensus among the political parties represented in the national parliament in respect of the paper. In addition, there was not sufficient incentive and not enough institutions to conduct the studies that would have been necessary for the top drawer reforms in education envisaged by the paper. Requirements on these planned reforms have in part been met through respective regulations and legislative measures, albeit mostly ad hoc measures without a more systematic perspective.

43.1.3 Political, Economic, and Cultural Framework of the Education System

The establishment of the Slovak Republic in 1993 was a unique opportunity for the Slovaks. They were able to build up their own nation without having to rely on the political influence of anyone else. This of course had an effect on the nature of the political, economic, social, and cultural system in the country. While in the Czech Republic, Hungary, or Poland, for example, a pluralistic system of political parties had ensued since the political upheavals at the beginning of the 1990s that was more or less characterized by a left-center-right spectrum, political opponents in Slovakia were more focused on the question of where authority and democracy in public life was located and on questions of nationalism, isolation, alignment to the East or toward the European Union, and similar issues. The right-left alignment of political parties in Slovakia only came to being in recent years.

When it was formed, it appeared as if the Slovak Republic were the least developed country in the region. Slovakia is also multiethnic: 85.8 % of the population is Slovak, 9.7 % is Hungarian, 1.7 % describes themselves as Roma (it is actually assumed that the proportion of Roma is around 9 %), 0.8 % is Czech, and 2 % is Ruthenian, Ukrainian, German, Polish, and others (Mládek et al. 2006). This structure is not attributable to the twentieth century migration but has older historic roots.

Following a turbulent phase of economic instability and relative international isolation, most of the problems of international relations, economic development, and social stability have been overcome, and Slovakia is now at least comparable with the other post-Communist countries in the region. In May 2004 it joined the European Union.

In 2008 Slovakia can boast a very high rate of economic growth comparable with other EU states. Successful reforms in terms of taxation and business have led to a considerable rise in investment from abroad, and this in turn has had a positive effect on the decline in unemployment. Economic growth manifests itself in all aspects of social life. Demand for qualified, geographically mobile, and flexible workforce is placing pressure on the education system, which, in contrast to other economic and social aspects of life, has been reformed least of all and still manifests symptoms of a stagnating system. If left untouched, this could have a negative impact on economic growth and the development of social life in the country.

43.2 Fundamentals, Organization, and Governance of the Education System

43.2.1 Current Policies and Aims in Education

The first revision of educational legislation after 1989 focused particularly on abolishing Marxist-Leninist ideology and thus primarily educational objectives. However, these were not replaced by adequate alternatives, and until the

introduction of the national education program “Millennium” in 2002, there were no officially documented education goals for Slovak schools.

Some of the few aims concerned the profiles of school leavers in certain subjects, particularly in secondary schools and university graduates, and educational aims were formulated for individual school subjects and school levels. At the beginning of the 1990s, aims were formulated in widely varying terms depending on the respective subject, content repeated itself, and it was hardly aimed at developing pupil skills, if at all, as in the past, these aims were uniformly defined for all pupils.

In 2007, educational content in the school system was reformed. A reformulation of educational aims was proposed, aims for specific education levels were developed, and profiles for the respective school leavers at different levels of education were defined. The overriding aims of education correspond to the proposals of the national education program, i.e., “individuals should be encouraged to develop their own identity in the best possible way, to acquire the education and skills that allow him/her to consciously handle the knowledge of things that control his/her life, to manage tasks efficiently also in collaboration with others, and to accept responsibility for one’s own actions both in private and professional life. Education should encourage pupils to discover, learn and act, pass judgement and make self-assessments, should convey the relevant knowledge and practical skills to enable individuals to understand various situations and their interrelationships. The main task of the school is not to deliver the right answers, but to inspire the production, expansion and application of knowledge and epistemological curiosity in pupils” (National Education Programme 2007, p. 4). Eight areas of key competences were defined in coordination with the European Parliament and the European Council as the foundation for educational aims.

The years following the political change of 1989 were characterized by the dismantling of structures that either visibly or subtly strengthened the selective nature of the education system in Slovakia. Some initiatives formulated the desire for a “personal face” for each primary and secondary school. Therefore, schools set up more and more classes to support pupils with special learning abilities, most of them rooted in their socioeconomic backgrounds. The introduction of the 8-year grammar school was a further step in strengthening this trend. In public discussions on the necessary school reform, this social dimension of the change in the education system was not a salient topic. The only exception was the discussion on integrating children with special education needs in normal schools, which was not possible prior to 1989.

The social situation of the majority of Roma living in Slovakia and the process of internationalization triggered a change. The latent exclusion of Roma from the education system had already existed prior to 1989, but it was the economic recession that led to high unemployment after 1991 and mainly hit the lowly educated and the socially weak, represented most of all by the Roma, that drew attention to the problem. The cause for this was seen in their low level of education and the social segregation. Often without reason, Roma children were singled out as learning-disabled children in school. As a measure to promote their social integration, the government passed a law to create equality in education. The new law

created the framework for access to preschool education for Roma children, introduced Year 0 in primary schools offering compensatory lessons to Roma children from an uneducated environment, enabled assistant teachers to be employed in kindergartens, and introduced measures in primary education to integrate Roma children in the education system and improve their chances of achievement (Zelina et al. 2004; Porubský 2006, 2007).

International studies such as PISA and PIRLS, in which Slovakia first took part in 2003 (PISA 2003, 2006; PIRLS 2006), highlighted the selective structure of the Slovak education system and the significant extent of its social inequality. This put the government and other administrative bodies under pressure to change their educational policies. A series of complex steps have been initiated aimed at opening the education system in Slovakia, making it more efficient and just.

43.2.2 Legal Framework

The Act on the System of Primary and Secondary Schools from 1984, based on the educational policy of the Czechoslovak Socialist Republic, was valid in Slovakia until 2008. Between 1989 and 2007, however, this law was amended a total of 18 times. These amendments show what educational politics had spawned between 1990 and 2005 and what education administration had concentrated on.

The first amendment was passed at the beginning of 1990 and removed the ideological monopoly of the Communist Party from the education system. In addition, the pluralist character of the education system was defined, and the establishment of private and confessional schools as an alternative to the state school system was allowed. Compulsory schooling was set at 9 years (previously 10).

Following the proclamation of the Slovak Republic in 1994, legislative changes were instigated. The right of ethnic minorities to be taught in their mother tongue was again confirmed. The number of compulsory years at school was again raised from 9 to 10 years in an amendment passed in 1998.

In 2000, another amendment targeted improvements in the education of pupils taught in special schools because of their special educational needs. While these schools were renamed “schools with special primary education,” all educational functions, approaches, and methods remained the same.

To date, the only legislative amendment of any deeper systematic effect stems from 2001. The local communities and parent authorities became the maintainers of schools – a task formerly of the state, which had also influenced school funding. Another amendment from the same year stipulated that schools are to be funded from various sources in the future. The financial budgets that the state allocated to schools are based on normative indicators such as pupil numbers.

The amendment passed in 2002 redefined the 9-year basic education. This is to be fulfilled in a 9-year school form, and for 6-year-olds who do not meet the requirements at the start of school and who come from socially disadvantaged families, this is to be preceded by a preschool class (Year 0). The curriculum of Year 1 does not have to be packed into a single year; instead children can be given the best possible

preparation for normal school life over a period of 2 years. Within this context, it also became possible to employ assistant teachers at kindergartens and primary schools. They can help children to overcome their mostly language, health, and social barriers and successfully participate in school life. The amendment from 2003 defined the maximum working week for teachers jointly in an administrative law.

An amendment from 2005 was passed in connection with an anti-discrimination bill. The provisions contained in the amendment regulated equality of opportunity in the education system, in particular in respect of all persons involved in integration. In principle, this opened up schools to a democratic method of management with normal schools made accessible to children with special education needs; however, without the corresponding curricular reforms, the implementation of these provisions cannot be guaranteed. A group explicitly singled out with special needs is comprised of gifted children.

The law from 1984 and its amendments speak volumes for how the state education administration understood the concept of educational reform. The situation was a similar one for all other laws that had a fundamental influence on the education system in Slovakia. This applies to the Law on the state administration and self-governance in education from 1990 with its supplements and amendments from 1996, 1999, 2001, 2003, 2004, 2005 and 2006, the Law on Higher Education from 1990 with its six amendments, the Law on the funding of primary and secondary schools from 2001 with one supplement and two amendments, etc.

All these facts make clear that the process of change in the Slovak Republic does not enjoy any conceptual foundation. Although gradual progress and legislative change can be seen, the National Education Program, Millennium, remains a purely proclamatory document.

In 2007, preparations started for a new education act and curricular reform. In 2008, the national parliament passed a new Education Act.

A new legislative framework created by the Education Act in 2008 allowed the implementation of a curricular model fundamentally different from the previous ones. It represents a two-level participative curricular model:

1. The *State Educational Program* was developed as a set of frame curricular programs on a national level for each type of school following the same general aims oriented mainly toward the development of key competencies.
2. The *School Educational Program* consists of elaborated educational programs developed by every school based on the national curriculum.

The program also defines educational content organized into broader educational areas. There are eight educational areas for each type of school, integrating teaching subjects according to thematic or target similarity and allowing interdisciplinary projects.

Educational Standards guarantee educational quality across generally accepted levels. They represent state requirements for educational outcomes at each level of education. Educational standards define the minimum content of education necessary to reach the required performance skills and outcomes to be gained by pupils.

The Framework Study Plan defines the minimum obligatory time and structure of instruction in different types of school and the number and scale of compulsory subjects per week for each school year. Besides these, schools can offer other subjects and other educational activities as a part of their school curriculum.

43.2.3 Governance of the Education System

The Law on State Administration and Self-Governance in Education (2003) concerning the administration of preschool, primary and secondary schools, and school buildings is structured in top-down hierarchical fashion. The highest level is the Ministry of Education with other key state administrative bodies, followed by local bodies of school inspection and building management through to school management. The Ministry of Education is the key body of state school and school building administration. It is a national body for administering education and providing a uniform policy on education at national level. The Ministry passes key conceptual documents on school policy, legal provisions, and binding regulations or the organization of the school year. This includes the management and personnel work as well as the entry qualifications and in-service training of teachers and school funding. The Ministry recognizes the network of schools and decides on the organization of functions and funding of schools; it also accredits educational programs and recognizes school experiments. It directly administers nationwide educational institutions (State Educational Institute and State Vocational Education Institute) and facilities for in-service training – the education centers. Its main responsibility lies in the development of general curricular and education standards for all types of school and school buildings for preschool, primary, and secondary education.

General school administration is conducted at regional level by eight self-governance institutions which took up their work in 2002 in those towns and cities where the state transferred administration to community and regional bodies in the same year. The Ministry of Education sets up the regional school offices for them to take up their administrative tasks for the respective region. It can also set up schools and school buildings when the self-governing region has not provided the institutions required for compulsory schooling or offer certain specialist subjects. The regional school offices provide state funds for the development of affected schools in the region.

Self-governing regions can establish and close general education secondary schools and vocational secondary schools, schools for practical training, special schools, facilities for school meals, schools of art, leisure centers, and other regional schools. The school authority administers these facilities directly and provides them with financial funds as well as technical, personnel and building resources, and school materials and equipment.

Local authorities can establish kindergartens, primary schools, and various local school facilities. These are administered directly, and they are provided with financial, material, technical, and personnel resources to conduct school operations;

the authorities can also distribute financial funds. The local authorities are also authorized to make decisions in matters they have initially handed over to the school management to decide (Education in Slovakia 2005).

Schools are managed by head teachers who are appointed by the self-governing local authorities on the basis of a selection procedure conducted by the school council. Together with the school management, head teachers administer teaching staff and are directly responsible for the nature of educational work conducted at the school, for fulfilling school plans, for curricula and educational standards, for in-service teacher training, and for the sustainable safeguarding of the school budget and for maintaining school property.

The school does not enjoy a great deal of autonomy although the management of the school is in the hands of the school itself. Regional and local school authorities take care of public interest and school management of the interests of pupils, teachers, and parents.

Universities are self-administering, independent facilities with authority across all areas. The Ministry of Education provides the funds necessary to run course and conduct academic activities based on the university's output in terms of research and teaching.

43.2.4 Funding the Education System

International statistics reveal that Slovakia is one of the most underfinanced education systems: in an international comparison of OECD states from 2002, Slovakia was next to last in terms of per capita expenditure on education (Education at a Glance 2005). This situation is arguably a reason for the poor quality of the education system in Slovakia in international comparisons, as measured in the PISA studies.

Since 2004, school funding has been regulated by a new law. Accordingly, expenditures, including those for salaries and maintenance for all primary and secondary schools, are fully covered by the state. Payments are based on standards that take account of the qualifications, professional levels, and requirements of staff and include salaries and other payments such as insurance. The normative costs to run school operations are defined per pupil and per type of school, adjusted for the economic requirements of a course and the conditions of the place of learning/study. In addition, the normative financing guidelines also comprise the in-service training costs per teacher.

Likewise, the universities are funded via normative financial measures. State bodies do not fund private universities, however, which are solely financed through tuition fees. Public universities receive financial allowances from the state budget for teaching and research based on the respective academic performance of the previous year. Financial support for courses is based on the number of students and graduates, their success on the labor market, the requirements of the programs, and qualifications of lecturers. Public universities are not allowed to charge tuition fees for full-time students. Since 2008, selected programs can charge tuition fees for external students but then do not receive state support for these students.

Education is free of charge at all forms of public schooling, except for part-time PhD studies, and all school materials are also free during compulsory schooling. Rural district authorities also reimburse pupils for travel costs to the next closest school. In primary schools, pupils from socially disadvantaged families are provided with financial support. At secondary schools and for higher education, there is a system of financial support for students from socially weak families whose school achievement is very good. At kindergartens, parents render contributions toward the care of the children, meals, and materials. At primary and secondary schools, parents share the costs of school meals.

43.2.5 The System of Quality Management

There is a two-pronged method of continually monitoring and evaluating the quality of education. Monitoring is carried out by head teachers who regularly observed the teaching process in various classes and who give a variety of test to their pupils. However, there are no general criteria or indicators for describing school quality: tests are the sole responsibility of the school management and represent a form of self-evaluation.

State inspections of schools are an independent instance of external school evaluation. As a state body for the control of quality, they evaluate the education system, the education process, and its environment, schools, and facilities. State inspectors conduct independent surveys of school quality, observe key areas of education, and publish the results. Eight inspection agencies cover the whole of the country.

43.2.6 Teacher Training and the Social Position of the Teaching Profession

Teachers of all school forms and levels require a university degree. Kindergarten teachers are trained as a rule at upper-secondary vocational schools of pedagogy, but even here the number of university graduates is rising. Primary school teachers are trained to teach all main subjects, whereas teachers in secondary schools specialize in two subjects.

The teaching community invests a great deal of effort in changing the current situation of the teaching profession. As an initial result, the government decided in 2007 in favor of a conceptual program on professional development that highlighted the new, lifelong model of development and training for specialist educators. By documenting specific qualification levels and meeting quality standards in the profession, teachers can attain promotion and higher salary levels. In a subsequent step, a law is being prepared for employees in education. For the first time in the history of Slovakia, the teaching profession is to be regulated at the highest level of the legislature. At present public access to the draft bill is intended to stimulate public discussion.

43.3 Overview of the Structure of the Education System

43.3.1 Preschool Education

The *kindergarten* is responsible for preschool education of children from the ages of 3 (sometimes 2) to 6 years. The aim is to supplement family-based education, to foster the development of the child's whole personality, and to prepare children for school-based learning. Attendance at kindergartens is optional. Special kindergartens or groups for children with special educational needs have also been set up.

43.3.2 Primary and Lower Secondary Level

The basic school covers the first level of the 10-year compulsory schooling. It last 9 years and consists of two levels: the first level lasts 4 years, and the second level – the lower level of secondary education – lasts 5 years. The school offers general education and prepares pupils to attend secondary school. The curriculum is binding for all pupils. It is determined centrally and can be taught on the basis of three alternative syllabi. Most basic schools also provide extracurricular activities such as clubs, a school library, and other facilities.

At the beginning of the 1990s, in addition to the stand-alone 4-year academic secondary school, an 8-year upper-secondary academic school, the gymnasium, was introduced. Pupils in the final year of the primary level with good school achievement can enroll in this school by taking an entrance test.

43.3.3 Special Schools and School Advisory Services

Children with special education needs attend the *special basic school*. In terms of structure, these schools are basically the same as standard basic schools, differing only in terms of curriculum and educational strategy. Children are usually accepted on the basis of recommendations made by regional educational or psychological centers. Special schools and special educational services (*educational and psychological prevention centers*) aim at protecting children from socio-pathological effects and at obviating a problematic development. They also advise children from socially and psychologically disadvantaged families. *Diagnostic centers* conduct psychological and special educational test on children referred for behavioral reasons and court injunctions to be able to give them a more suitable school education. *Educational and psychological advisory centers* are also part of the educational advisory service. They are on hand for schools and families, providing professional services in the fields of education, personal development, and specialist qualifications of children, and compile educational and psychological diagnoses. *Special educational advisory centers* provide diagnostic, advisory, and rehabilitation services for children with special educational needs and for the parents and teachers. These centers are mainly attached to special schools. *Centers for the*

integration of children are autonomous facilities that provide the same services for preschool children. They provide general compensatory services for the preschool sector. In addition, specific educational advisers work at primary and secondary schools, focusing increasingly on problems arising during pupils' school life and on the search for vocational training and work. Some psychologists and special educationalist are employed at larger schools.

43.3.4 Upper Level of Secondary Education

The upper-secondary academic school provides general secondary education and is home to pupils for their final year of compulsory schooling. Secondary education is in the shape of one of three types of upper level secondary school: the grammar school (gymnasium), the technical secondary school, and the vocational school.

The *gymnasium* prepares pupils for further study in higher education institutions or in other tertiary education facilities. The educational programs normally last 4 years, but there are also 5-year bilingual gymnasiums. Some gymnasiums also offer an 8-year program. The gymnasium ends with the *matura* examinations.

The technical secondary school provides a higher level of vocational secondary education. Schools prepare pupils for their working careers in all aspects of business, administration, art, and culture and for social life. At the same time, pupils are prepared for further study.

Vocational schools offer qualifications in a widespread field ranging from manual professions and technically skilled work in all sectors of production and commercial services. Programs last 3–4 years. At the end of the 3-year program, it is possible to add on another 2-year course to acquire a secondary school certificate at the ISCED 3A level.

Apprentice schools have been set up for 15-year-olds who have not successfully completed basic school. This type of special school prepares leavers for less demanding professional occupations.

43.3.5 Postsecondary Education

There is no tradition of postsecondary education with stand-alone facilities in Slovakia. Corresponding educational services are integrated in secondary schools and adult education centers.

43.3.6 The Tertiary Education Sector

Higher education institutions provide study programs at three levels: bachelor programs usually last 3 years, masters' and engineering programs take a further 2 years, and PhD programs another 3 years. Some state higher education facilities are directly maintained by a ministry (e.g., the Ministry of Defense). Since 2004

there are also private institutes of higher education. To date, all state and public higher education facilities have been organized in the form of universities. Universities may only offer programs and award degrees previously accredited by the Accreditation Council of the Slovak Republic.

43.4 Developments in the Current School System

43.4.1 Instruments and Measures Deployed in Quality Assurance

To date, no adequate system to evaluate and monitor the quality of the school/education system has been drawn up at national level, and there are no national quality standards for the various types of school. Since 2003, a national system of monitoring the achievements of schools called “Monitor” has been gradually developed. The national educational institute is implementing the program using written tests in Slovak (or the relevant language of instruction for schools for ethnic minorities) and mathematics for all pupils leaving the basic school.

Since 2004, a new type of school leaving certificate (the *maturita*) has been implemented for secondary schools that in part serves as an evaluation tool for educational quality. The examination for the certificate consists of an internal and external part and comprises three levels of difficulty. Pupils are free to choose between these levels of difficulty depending on their interests and their plans to continue their education. The external part makes it possible to compare the quality of achievements at secondary school. This form of controlling educational quality measures achievement in relation to the prescribed curricula and standards.

The results of Monitor and the final school examination could be used by universities as admission criteria, but because of the complicated system of final examinations at secondary schools, most universities do not accept these in their enrollment procedure.

There are no national standards of education and school quality in Slovakia, and no reports or studies have been conducted on the actual condition of the education system. The only documents of any significance here are the national report on the international PIRLS Study (comparing the reading skills of children) conducted by IEA in 2001 and the data on competence in reading, mathematics, and natural sciences gathered within the scope of the PISA studies of 2003 and 2006. The results are not very promising for the Slovak education system. They manifest the need for complex and fundamental reforms.

43.4.2 Dealing with Special Problems

International studies show that the education system in Slovakia only provides limited added value. Accordingly, it is not able to provide children of different origins with the same school education. Quite the opposite, anomalies that arise through gender or social origin are reproduced by the school system. Slovakia is

one of the countries with huge differences in the test results of boys and girls: boys perform much better in mathematics and natural sciences while girls in reading.

One of the serious findings of the PISA study for Slovakia is that test results are highly dependent on the socioeconomic background of the pupils. This means that, in contrast to all official communiqués, the Slovak education system cannot guarantee social equality in school (PISA 2004). Educational success hinges most of all on the level of education of parents and on the social status of the family. Schools are therefore not actually fulfilling their compensatory function. It appears that only kindergartens are able to fulfill this role, assuming that children are there for at least 1 year.

In most OECD countries, schools have a much greater impact on pupil achievement than an individual's socioeconomic background. Slovakia is one of five OECD states with the greatest discrepancies between individual schools (PISA, SK 2005).

On the other hand, Slovakia is one of the OECD countries with the largest proportion of pupils that have completed secondary school; it is therefore one of the countries with the lowest proportion of adults (in the age group 25–65) – i.e., 14 % – that have only completed the lower level of secondary education. Slovakia also has the lowest number of pupils leaving the compulsory system early.

43.4.3 Schools for Ethnic Minorities

As a multiethnic state, Slovakia has a well-developed system of schools for ethnic minorities. These schools are integrated in the horizontal and vertical structure of the standard school system. Depending on the interests and needs of the respective minority, these cover preschool education through to higher education. The basic and secondary schools for ethnic minorities are organized as follows:

- Schools (or classes) in which the language of instruction is the language of the minority teach Slovak as a foreign language.
- Schools (or classes) in which the language of the minority is used together with the Slovak language in the form of bilingual instruction.
- Schools (or classes) in which the language of the minority is used for some subjects with all other subjects taught in Slovak.

At two universities, students with Hungarian roots can be taught some programs in their native tongue. One of these universities has two faculties in which Hungarian is the first language in lectures, while the other offers two courses in Hungarian.

43.5 New Developments

43.5.1 Discussions and Trends

The education system in Slovakia is complex: its educational facilities cover the relevant needs of the whole population in all age-groups and levels. There is a

particularly close network of institutions, especially in compulsory schooling. According to data provided by the institute for educational information and forecasting from 2007, the average capacity of kindergartens is 47 children per facility and of basic schools 224 pupils (based on the 2006–2007 school year). In this respect, there is a negative trend only in preschool education where the number of children attending kindergartens and the number of kindergartens themselves have declined recently. This decline is partially due to a general fall in population but is also caused by socioeconomic factors (Concept for Pre-school Education 2007).

The institutionalized guarantee for education ensures that the level of education in a population will rise. A rise has recently been noted in tertiary education. Internationally, this is, however, not sufficient as only 11 % of the adult population (25–65 year olds) has attended university (Education at a Glance 2004), a relatively poor showing in a comparison of OECD countries.

International studies (PISA 2003, 2006; PIRLS 2006) highlight the selective nature of the Slovak education system and its high degree of social inequality. The government and other administrative bodies are under a great deal of pressure to change educational policies. A series of steps has been introduced to reform the system and open the Slovak educational system to make it more efficient and more just. At present, these steps are being guided by public discussion.

The latest public discussion initiated by the Ministry of Education in 2007 affects the planned curriculum reform for basic and secondary schools. These reforms are principally targeting changes to the traditional encyclopedic, frontal school system that rewards learning by rote, making it a creative, humanistic system that emphasizes the active and free personality of children. At present, however, vertical and horizontal selection continues to characterize the Slovak school system. At a vertical level, pupils are selected at an early stage based on their achievements: even at the age of 10, some children leave the general basic school and change to an 8-year grammar school. Prior to the end of compulsory schooling, the next general selection takes place: pupils change to various forms of secondary school where they spend 1 year completing their compulsory schooling. The selection is expanded by the number of pupils that have to repeat a school year because they have not attained the required marks in at least two subjects.

At the horizontal level, selection is based on a system of special schools, in particular for children with learning difficulties. In many cases, children from socially disadvantaged families are packed into these schools without actually having any learning difficulties. This chiefly concerns Roma children. Generally, these children could also be accepted by normal schools, but unfortunately there is no practical method of assessing individual differences and provided individualized learning.

This next problem concerns early school leavers who could be returned to the educational process, albeit with the difficulty of providing them a minimum of qualifications they need to function meaningfully on the labor market – even though their numbers are relatively low.

The Ministry of Education has recently initiated a further series of professional activities to transform the curriculum for the basic school and for the secondary school. In July 2007, the national parliament passed amendments to the law on

higher education. Unfortunately, the government is continuing to follow the same old patterns that existed prior to the amendments. Current problems are taken into account without having any profound effect on the education process. It seems that the curricular reform triggered in 2008 by the Education Act created many possibilities and also many doubts which still need discussion, political consensus, and massive economic support to successfully reach at least the basic aims of the newly formulated education policy.

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J. Mlakar (✉)
Sv. Stanislava College, Ljubljana, Slovenia

44.1 History and Social Parameters of the Education System

To understand the present-day Slovenian school system, it is necessary to be aware of the geographic, historic, and political circumstances surrounding its development. Slovenia covers an area of 20,000 km² and has a population of two million. Its capital is Ljubljana. It only became an independent state in 1991: for centuries – until 1918 – Slovenia lived under German or Austrian rule. From 1918 to 1991, Slovenia was part of the state of Yugoslavia. After World War II until 1990, a communist regime ruled Slovenia. The last big changes in the education system took place in Yugoslavia in 1958 at the behest of the Communist Party. All this time Slovenia was never allowed an independent education system.

The process of rethinking the nature of schooling and establishing Slovenia's own school system began in 1995. Reforms were largely triggered by the former government, run by the Liberal Democratic Party (*Liberalno demokratska stranka – LDS*). The other parties had little influence on the setup of the new school system. Pursuant to the Act on the Organization and Financing of Education (*Zakon o organizaciji in financiranju vzgoje in izobraževanja*) from 1996, the whole education system from the kindergartens to the universities underwent great change (the figure below clearly illustrates the current structure of the education system).

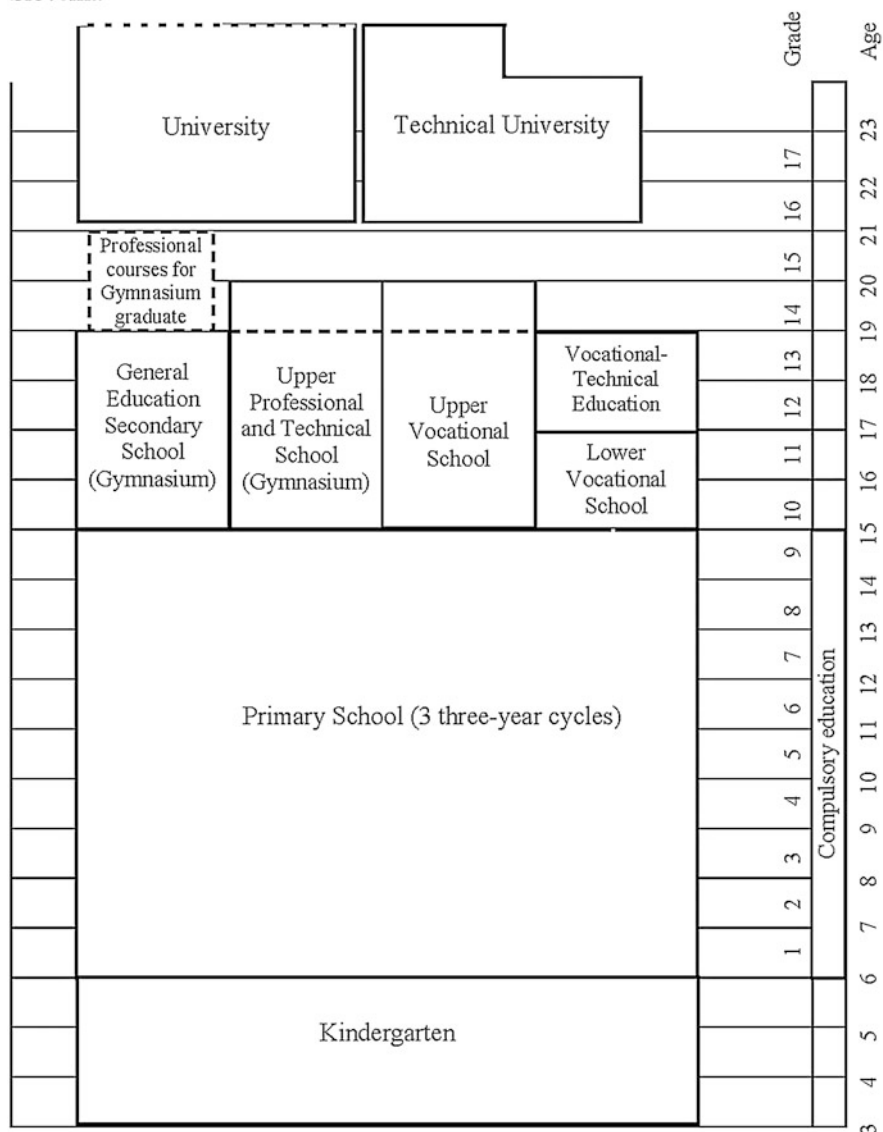
44.1.1 Cornerstones of Historical Development

The history of the school system in regions settled by Slovenes can be divided in three periods. The first and the longest is the period that ended in 1918. During this period, Slovenes could only be recognized as a Slovenian-speaking cultural group living in German-speaking states. The second period is the time of Yugoslavia, from 1918 until 1991. The third is the period after 1991, when the Slovene education system was able to develop in an independent state.

The nineteenth and twentieth centuries are marked by constant attempts to establish an independent education system. At first, efforts were aimed against German nationalism inside the Austro-Hungarian Empire, and then, after 1918, endeavors were aimed against Yugoslav-Serbian centralism. This achieved partial success. In 1905, for example, the first grammar school taught in Slovenian opened. But it was only in 1991 that an independent Slovenian school system actually took root.

The first traces of education among the Slovenes can be traced back to the time of Charlemagne in the eighth and ninth centuries. The transmission of knowledge or the teaching to read and write took place at the same time as Christianization. The oldest known written documents in Slovene are the so-called Freising manuscripts (*Brižinski spomeniki*) from the tenth century, which probably are transcripts of ninth-century originals. From the twelve century onwards, when the first schools (convent and parish schools) on Slovene territory were founded by the church until the time of Empress Maria Theresa and Emperor Joseph II in the eighteenth

Slovenia



century, the educational objective was to gain eternal life. However, the intention to teach practical aspects as well was represented by medieval town schools. A very important impulse for Slovene identity was provided by the Protestants, especially by Primož Trubar (1508–1586), who wrote the first Slovene books in 1550 and printed a translation of the Bible.

Further progress was achieved by the reforms of Maria Theresa (1717–1780) and Joseph II (1741–1790). They wanted to enable all their citizens irrespective of gender or class to achieve a general education and therefore promoted common schools. A law was passed in 1774 which made schooling compulsory. In Austria, the German language was the same denominator in all schools in Austria, so that the different peoples in the state could communicate in one common language. Slovene was taught from the Catechism, which was written in Slovene. The Slovene bishop Anton Martin Slomšek (1800–1862), who was considered a defendant of Slovene rights and encouraged people to speak Slovene not only in their private but also in public life, was of great importance for the development of the Slovene culture and education of the lower classes. A turning point in the Slovene history of schools was the founding of the first Slovene grammar school (*gimnazija*) in Šentvid near Ljubljana (*Škofijska klasična gimnazija Šentvid*) in 1905. After the downfall of Austro-Hungarian Empire in 1918, the Slovenes, the Croats, and the Serbs united in one state, initially named the Kingdom of Serbs, Croats, and Slovenes, later changing its name to the Kingdom of Yugoslavia. During that period (1918–1941), the education system in Yugoslavia was strongly centralized.

44.1.2 Important Reforms and Phases of Innovation in Education and School Policies in the Last 30 Years

Most developments undertaken made after 1980 were politico-ideologically motivated. One example of this is the introduction of “oriented education” (*usmerjeno izobraževanje*). Pursuant to the Act on Oriented Education from 1980 (*Zakon o usmerjenem izobraževanju*), grammar schools were abolished and changed into specialized, i.e., vocation-oriented secondary schools. A specialized school trained their pupils for defined categories of jobs. Between 1980 and 1990, Slovenia witnessed the establishment of natural science, social science, technical, educational, and other vocational schools. The required guidelines for the educational reform were passed at the congresses of the Yugoslav and Slovene Communist Parties. The idea leading to the reform stemmed from the notion that grammar schools were educating only the elite, and it was therefore supposed to be more difficult for pupils from vocational schools to obtain a higher education. The system of “oriented” schools was strongly opposed and criticized throughout society, especially by the younger generation. Therefore, when the regime changed in 1990, they were abolished without further discussion.

To abolish “oriented” or targeted education, a souvenir from Yugoslav times, a change in legislation was required. In 1995, the Minister for Education, Science, and Sport passed adequate guidelines, and the white paper on “Education in the Republic of Slovenia” was published. This white paper argued that the theoretical basis for the education system had to be human rights and a state abiding by the rule of law. The principles included proximity to citizens, autonomy, and equal opportunities for all. Every person has the right to an education. Elementary education is

free of charge. Parents have the right to choose the form of education for their children. Hence, it is the state's duty to sponsor private schools and to provide them with equal legal framework.

44.1.3 Sociocultural Framework for the Development of the Education System

Besides Slovenian nationals, Hungarians and Italians also live in the country and are recognized minorities. Italian children have the right to attend special schools in which lessons are taught in Italian. In the ethnically and linguistically mixed Slovenian-Hungarian areas of the country, children can attend bilingual schools. There are no special provisions for mother tongue instruction for Roma families who live in various regions in Slovenia; Roma children attend Slovenian schools.

44.2 Fundamentals, Organization, and Governance of the Education System

44.2.1 Current Educational Policy and Goals of the Education System

The most important policies and aims for education in Slovenia were published by the Ministry for Schools and Sports in the document *“Education in Slovenia: yesterday, today, tomorrow” (Slovensko šolstvo včeraj, danes, jutri)*.

Of primary importance is the implementation of three main goals targeting skill areas: skills to solve problems and issues creatively, skills to collaborate and communicate with other people, and skills for lifelong learning. Lifelong learning is not only a fundamental important educational policy in terms of societal developments, but it is also an attitude to life that affects each and every individual. At the beginning of 2007, Slovenia launched its concept of lifelong learning in which the transfer of knowledge and experience among the generations became a key element. In addition, Slovenia established specific strategies and measures drawing on experience within the EU to improve formal and nonformal education and informal learning.

In 2006 the law governing national vocational qualifications was passed that created the foundation for networking formal and nonformal education. Moreover, the law created the foundation to transfer achievement and knowledge acquired in various areas and at different levels in the education process. The government is planning a new white paper on upbringing and education.

44.2.2 Legal Foundations of the Education System

The legal framework of the Slovene education system is the Act on the Organization and Financing of Education (*Zakon o organizaciji vzgoje in izobraževanja*).

The act regulates the education from the kindergarten to professionally oriented higher education. It also defines the work in boarding schools, music schools, and adult education. The law determines the norms for minorities and children with special needs. Every part is further regulated in fuller detail by other laws.

44.2.3 Governance of the Education System

State and private schools differ in their management of schools. State schools at all levels are under the responsibility of the Minister for Education, Science, and Sports (*minister za šolstvo znanost in sport*). Important levels of governance include the Council of Experts, the school councils, the parents' councils, the head teacher, teaching staff, and class teachers. Their individual responsibilities are described below.

44.2.3.1 Council of Experts

The highest panel in various spheres of the education system is the Council of Experts (*strokovni svet*), whose members are appointed by the government for:

- General education (strokovni svet Republike Slovenije za splošno izobraževanje)
- Vocational and technical education (strokovni svet Republike Slovenije za poklicno in strokovno izobraževanje)
- Adult education (strokovni svet Republike Slovenije za izobraževanje odraslih)

These Councils have a wide range of responsibilities. Among other things they confirm:

- Curricula of state schools and kindergartens
- Subject syllabi
- Test catalogs for the external state exams on different levels
- Textbooks
- Curricula of private schools (which they also control)

44.2.3.2 School Councils

School councils (*šolski svet*) are the administrative bodies of individual state schools; their members are the representatives of parents, teachers, the maintaining body, and local authorities. In secondary schools, the representatives of pupils are also members of the school council. The mandate of the council is 4 years. Its most important duties include:

- Appointing and dismissing the head teacher of the school
- Confirming the yearly plan
- Passing judgment on complaints by pupils, parents, and staff

44.2.4 Head Teacher, Teaching Staff, and Class Teachers

The head teacher (*ravnatelj*) is the pedagogical and managing director of a school. Among others his/her tasks include:

- Organizing and managing day-to-day work
- Preparing the program for the future development of the school
- Preparing the yearly plan and meeting it
- Establishing pupils' rights
- Employing teachers and other staff

The head teacher has a deputy, who he/she chooses from among the teaching staff. The head teacher is appointed or dismissed by the school council. His/her appointment must be approved by the Minister. The mandate is for 5 years. The teaching staff (*učiteljski zbor*) decides on disciplinary measures in the case of severe violations of school regulations and functions as the head teacher's council. Class teachers (*razrednik*) deal with problems in the class or with pupils' problems. Class teachers also decide on smaller breaches of regulations.

44.2.4.1 Parents' Council

The members of the parents' council (*svet staršev*) are elected by the parents of each class, and they have the following tasks:

- Suggesting and appointing additional programs for the school
- Voicing their opinions about the yearly plan and the further development of the school
- Discussing parents' complaints
- Electing their representative to the school council

Governance in Slovenia's education system is characterized by two significant principles – self-responsibility and state supervision.

44.2.4.2 Supervision and Self-Responsibility

Two independent organizations supervise schools. The expenditure is controlled by the National Agency for Finance (*Računsko sodišče Republike Slovenije*), whereas work done in schools is supervised by the Inspectorate for Education (*Inšpektorat Republike Slovenije za šolstvo*).

Self-responsibility is mainly applied to monitoring the quality of classes. The highest instance in the assessment of quality is the head teacher. He/she has a certain amount of money at their disposal (2 % of all salaries) and can reward teachers for exceptional work in the form of bonuses. The head teacher also manages activities and projects that involve the quality of the school. Furthermore, individual schools or groups of schools are involved in projects experimenting with the notion of self-evaluation.

44.2.5 Financing the Education System and Its Institutions

State and private schools are financed from various sources. The state or the local authorities provide the funds needed for everyday work as well as for investment in state schools. Private schools are only entitled to state financing for salaries and 85 % of the material expenses. The maintaining body must provide for school equipment and facilities. For additional programs or a higher standard of equipment, local authorities, companies, and parents may contribute on a voluntary basis. Many schools have a school fund (*šolski sklad*) to which parents and other sponsors may donate money for school equipment.

44.2.6 Relationship Between the Public and Private Sectors in the Education System

The public service (*javna služba*) in education is provided by the schools and kindergartens, which are enclosed in the public network. The national government determines the extent of this network. Provided they have a license issued by the state, private schools are also included in this network. Licensed private schools and kindergartens have the same rights and duties as state schools. They are wholly financed by the state, but they must abide by the same rules and guidelines as state schools. On the other hand, there are private schools that operate without a license. They are entitled to 85 % financing by the state. In general, the financial conditions for those schools are the same as for state schools, but they have the right to educate children according to their principles and beliefs, such as confessional schools. In Slovenia at present there are four Catholic grammar schools, one non-confessional grammar school, and one Waldorf school which follows the educational principles of Rudolf Steiner. State kindergartens, primary schools, and music schools are provided for at the discretion of local authorities, and secondary schools of various types and polytechnics are provided by the state. However, with the permission of the state, grammar schools may also be founded by local authorities.

44.2.7 System of Quality Development and Support in Education Facilities

Self-responsibility is mostly applied to developing and assuring the quality of classes. The head teacher is responsible for assessing the quality of education within the school. This includes the regular assessment of the quality of each teacher which is then used as the basis for raising or lowering teacher salaries. The head teacher is also responsible for all activities and projects that are directly related to the quality of lessons and of the school itself. In individual schools and in networks of various schools connected in projects, there are now the first signs of internal evaluations. As before, the public's main criterion for judging the

quality of schools is success in the *Matura*, the advanced school leaving certificate, and in other final examinations.

Two independent organizations supervise schools. The expenditure is controlled by the National Agency for Finance (*Računsko sodišče Republike Slovenije*), whereas work done in schools is supervised by the Inspectorate for Education (*Inspektorat Republike Slovenije za šolstvo*).

44.3 Overview of the Structure of the Education System

At present, education (*vzgoja in izobraževanje*) in Slovenia encompasses:

- Preschool education (*predšolska vzgoja*)
- Basic education (*osnovnošolsko izobraževanje*)
- (Upper) secondary education (*srednješolsko izobraževanje*)
- Professionally oriented higher education (*višje strokovno izobraževanje*)
- Higher education (*visoko izobraževanje*), including postgraduate education (*podiplomsko izobraževanje*)

This structure also includes adult education and music schools. Children with special needs (*otroci in mladostniki s posebnimi potrebami*) are usually integrated in schools together with other children.

44.3.1 Pre-primary Education (Predšolska Vzgoja)

Pre-primary education is not compulsory. It takes place in kindergartens and special units in primary schools for children from the age of 1 to 6 years. Children who opt for the 8-year primary school have to attend the so-called little school, a preparatory year 1 year before entering school. The “little school” is being abolished in favor of the 9-year primary school. In the last 10 years, we have seen the development of private kindergartens, which follow special educational guidelines (Waldorf, Montessori, Freinet) and confessional facilities (e.g., Catholic kindergartens). General educational themes in kindergarten include music, art, and healthy nutrition. Preschool education is regulated by the 1996 Act on Kindergartens (*Zakon o vrtcih*).

44.3.2 Primary Education (Osnovna Šola)

Children enter the 9-year primary school (*devetletka*) at the age of 6. The *devetletka* is subdivided into three periods or cycles:

- First cycle, from Years 1 to 3
- Second cycle, from Years 4 to 6
- Third cycle, from Years 7 to 9

According to the international classification ISCED, the first two cycles, i.e., Years 1–6, are part of primary school and the last cycle, Years 7–9, is classed as lower secondary school.

Year 1 is taught by a class teacher (*razredna učiteljica*) and an assistant (*vzgojiteljica*). The class teacher guides and teaches the children up to Year 3, and may stay on as class tutor until the sixth grade, but from year to year will teach fewer subjects. In Years 4, 5, and 6, the number of subjects taught by subject teachers increases gradually. The assistant teacher also remains with the class. In the third cycle all subjects are taught by subject teachers; nevertheless, the class teacher still has an important role to play.

In the first cycle pupils receive a descriptive assessment of their achievements in school; in the second cycle they receive, in addition, a report card with marks ranging from 1 (inadequate, *nezadostno*) to 5 (very good, *odlično*); and in the third cycle marks are only expressed numerically. In the first two cycles, all pupils automatically advance to the next school year; in the third cycle, they have to pass each subject in order to advance. Pupils with unsatisfactory marks can resit examinations. If they do not pass, they have to repeat the year. In Years 8 and 9, pupils may choose one of three different levels of complexity in subjects such as their native language, mathematics, and foreign languages. Pupils from the same class are therefore separated and divided into different groups in those subjects. Most able pupils are expected to choose the most demanding level in order to receive a better basis for their further studies, especially for their grammar school education.

Each period or cycle ends with national tests. At the end of the first and second cycles, test results do not influence the pupils' transition to the next school year but are solely intended to inform parents and teachers of the child's progress. Participation in the tests in the first and second cycles is voluntary. At the end of the third cycle, however, tests are compulsory. Tests assess achievement in the native language, mathematics, the foreign languages, one scientific subject, and one social science. It is only possible to complete primary school by passing this test. Afterwards the children can choose to continue their education in secondary or grammar schools. Pupils who do not pass this final test may end their education after Year 10 of primary school.

The curriculum of the 9-year primary school is divided into the compulsory program (*obvezni program*) and the expanded program (*razširjen program*). The compulsory program comprises compulsory and elective subjects as well as class lessons (*razredna ura*). Compulsory subjects include: Slovenian, Italian, or Hungarian for the ethnic minorities, a foreign language, history, geography, ethics and society, mathematics, chemistry, physics, biology, art education, music, physical education, and handicraft or home economics. In the third cycle, pupils can choose two or three subjects from a wide range of subjects. These can be divided into two groups: a socio-humanistic and a scientific-technical category. It is obligatory for all schools to offer their pupils non-confessional religious education with ethics (*nekonfesionalni pouk o verstvih in etika*), foreign languages, and rhetoric. For pupils between Years 1 and 6, the expanded program comprises supervision before

and after class (*podaljšano bivanje*), additional lessons (*dodatni in dopolnilni pouk*), and various voluntary activities.

New educational legislation passed in 1996 mentions pupils with learning difficulties or children with special needs who are physically or intellectually disabled as well as those who are extraordinarily talented. Schools are obliged to organize special lessons for those children, if necessary even with the help of specialists. Children and their parents can also choose to attend special school. Experience shows that pupils with disabilities attend regular schools and attain the same attainment targets as their peers.

Private primary schools in Slovenia are an exception: there is only one Waldorf school and one Catholic school. In law, private schools have to offer the same level of education as state schools. The Council of Experts for General Education monitors the curriculum of private schools.

44.3.3 General and Vocational Secondary Education

Secondary education after primary school lasts 4 (sometimes 5) years. In principle there are the following forms of secondary school in Slovenia (some of them are still work in progress):

- Lower vocational education (*nizže poklicno izobraževanje*) lasts 2 years and ends with a final examination (*zaključni izpit*).
- Upper vocational education (*srednje poklicno izobraževanje*) lasts 3.5 years and also ends with a final examination.
- Upper professional and upper technical education (*srednje strokovno oziroma srednje tehniško izobraževanje*) last 4, sometimes 5, years and end with a professional *Matura* (*poklicna Matura*).
- The vocational-technical training lasts 2 years, is a follow-on program to upper vocational education, and ends with a professional *Matura*.
- Professional courses for grammar school graduates (*poklicni tečaj*) who have not obtained the *Matura*. Pupils complete the program with a professional *Matura*.
- General education secondary schools – gymnasiums (*splošno izobraževalne šole - gimnazije*). This lasts 4 years and ends with the *Matura*.

44.3.3.1 General Education Secondary Schools: Gymnasiums

General education secondary schools included the general gymnasiums (*splošne gimnazije*) and specialist gymnasiums (*strokovne gimnazije*) that enable pupils to visit university. Italian- and Hungarian-speaking children can also use their mother tongue in the gymnasium.

44.3.3.2 Enrollment Requirements

To enroll at the gymnasium, pupils need documented evidence of having completed the primary school. Should the number of enrollments exceed places available at the gymnasium, candidates are chosen on the basis of their achievement at the

primary school. Depending on their focus, schools may also carry out additional tests on various fields of knowledge (e.g., in classic or modern foreign languages) or skills (in sport, art, etc.). Gymnasiums run a 4-year program. Pupils advance to the next year when they have passed all subjects. They are entitled to resit a maximum of three failed subjects at the end of a school year to try to improve their results and advance to the next year.

44.3.3.3 Matura

The *Matura* examinations round off the general upper secondary education. The examination is strictly controlled by the school authorities. The *Matura* examinations are partly external and partly internal: 80 % of the marks are derived from the external part and 20 % from the internal. The *Matura* comprises exams in five subjects: the native language, mathematics, and one foreign language are compulsory; two electives are chosen from a wide range of options. The results of the *Matura* are important: not only do they conclude the grammar school education, but it is also the “entry ticket” to university. There are no entrance examinations at universities: students are accepted based on their *Matura* results. The national examination center (*Državni izpitni center*) supervises the entire procedure of the *Matura*.

44.3.3.4 Curriculum

The grammar school curriculum comprises a compulsory part, i.e., regular lessons and activities in which pupils take part voluntarily. The compulsory part is established by the Council of Experts for General Education (*Strokovni svet Republike Slovenije za splošno izobraževanje*). In the case of private schools, it is established by its maintaining body founder and has to be approved by the Council of Experts. The first foreign language in Slovenia is usually English; the second can be German, French, Spanish, or Italian. Gymnasiums and even individual classes can emphasize certain subjects or parts of education, e.g., science (more lessons in mathematics, physics, biology, etc.), humanistic subjects (another foreign language or Latin), or sport (additional periods of physical education). The additional programs contain activities in which pupils participate voluntarily. These activities are excursions, competitions, performances, etc. Parents are usually expected to sponsor those activities.

44.3.4 Vocational Education

Specialized vocational gymnasiums are the link between general educational schools and secondary vocational schools. In these schools, certain subjects are taught which enable pupils to enter a certain professionally oriented higher education or a university on defined conditions. Currently in Slovenia there are professional gymnasiums of various kinds, e.g., economic, technical, or artistic grammar schools. Pupils may also choose their elective subjects at the *Matura* from among those specialized subjects. In technical gymnasiums subjects such as mechanical engineering, electrical engineering, and similar subjects are taught.

Vocational and professional education is an area of education primarily focused on providing various programs to prepare pupils for the world of work.

After completing primary school, pupils can choose between a 3-year vocational and a 4-year technical program. Pupils who did not successfully pass primary school examinations can continue their education in work-related short programs that aim to develop their basic skills (functional, mathematical, and scientific skills), training pupils for less demanding professions. Vocational-technical education has been developed as an upgrade of vocational education programs and leads to educational qualifications at the level of a secondary technical school. It lasts 2 years after finishing the vocational school. Master (craftsman) and supervisor examinations have been introduced recently. These enable learners to acquire university entrance qualifications to continue their education. Professional programs target learners who have passed their *Matura* and who want to qualify in a profession. There are also *Matura* courses for vocational school pupils.

The multifaceted range of programs on which external partners have also collaborated facilitates a smooth transition between secondary schools, which cannot always be taken for granted internationally.

The law on vocational qualifications (2000) has made it possible to recognize knowledge and skills acquired informally. This means that adults without any formal qualification have the chance to demonstrate the necessary knowledge and skills and thereby have their abilities certified.

44.3.5 Tertiary Education (višje strokovno izobraževanje)

Higher education in Slovenia is two pronged. On the one hand, there are universities with their focus on theory and research, while on the other hand technical universities deliver programs for students in higher technical schools (*visoke strokovne šole*). Whereas universities are allowed to offer both forms of higher education, the technical universities may only offer their own programs. The latter usually lasts 3 or 4 years, with the “Absolutorium” 4–5 years. Students may enroll either with the *Matura* or the vocational or professional *Matura*. The graduation exam rounds off the study program.

Professionally oriented higher education has been introduced only recently. The first schools were founded in 1996. The curricula emphasize practical education. The aim is to provide a link to the productive world; therefore, a considerable part of the education takes place in businesses. Those schools are institutionally separated from technical universities and universities. Students usually enter higher professional schools (*višje strokovne šole*) after a *Matura* or *Matura* at specialized professional grammar schools. The study program lasts a minimum of 2 years and ends with diploma examinations (*diplomski izpit*). Graduates from higher professional schools may work in certain professional fields, or they may continue their studies at the university in their second year.

44.3.6 Adult Education

Adult education is primarily delivered on the basis of the same vocational programs described above. Courses are offered in special public schools for adults or on afternoons or evenings in state or private general education schools.

44.4 Developments in the Current School System

44.4.1 Transfer Between School Years

At the end of the second and third cycles of primary school (primary and lower secondary education), pupils' knowledge and abilities are tested in national performance tests. These tests are voluntary for second-cycle pupils and mandatory at the end of the third cycle. The results however cannot be used as a criterion for acceptance at upper secondary level. Every pupil who has successfully completed primary school has the right to attend a facility at the upper level of secondary education. If there are too many enrollments for a secondary school, the school can choose the best pupils based on pupil performance at primary school.

44.4.2 Integration Measures

44.4.2.1 The Education of Roma

Most Roma live in the regions along the border with Croatia. Roma children at preschool age visit roughly 40 kindergartens spread across the country. In 2005/2006 a total of 1,608 pupils from Roma families attended primary school – all in normal classes.

In 2004, Councils of Experts for general education, for vocational and professional education, and for adult education developed a strategy for the upbringing and education of Roma in Slovenia which described the principles, goals, and fundamental solutions for the successful integration of Roma at all levels of the education system. Each year a national program for specifically implementing strategy goals is elaborated.

The state provides additional funds to primary schools accepting Roma pupils to promote individual-based work and group-based work involving Roma children. Moreover, the state allows lower standards to be defined for classes with Roma children and provides more funds for nutrition, school books, excursions, etc. Every Roma student receives a scholarship to study an educational profession.

44.4.2.2 The Integration of Immigrant Children

The law on elementary education stipulates that children of a foreign nationality or persons without citizenship who live in Slovenia have the right to compulsory education under the same conditions as Slovenian citizens.

Children from immigrant families, or their parents, who so wish have the right to some lessons in their mother tongue. This can take place once per week and last between 3 and 5 h. The Ministry of Education and the school authorities provide the necessary organizational and specialist assistance in training and recruiting teachers in the respective mother tongue which is then taught as a second and/or foreign language.

44.5 New Developments

There is currently an ongoing public discussion on how better to motivate young people for technical schools. These schools are facing a huge shortage of students. As a result there is a shortage of qualified craftsmen on the labor market.

In addition, experts are discussing new educational methods across all levels of the school system. Some groups of pupils are also working on projects aimed at reviewing and modernizing the curriculum. The focus is on an integrative and flexible curriculum, on interactive lessons with a problem-solving approach to learning, etc.

Other developments of the Slovenian education system are to appear in a new issue of the white paper, but little as yet is known about the content. However, a good sign is that various experts with differing viewpoints have been invited to contribute.

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M.J. Martínez Usarralde (✉)
University of Valencia, Valencia, Spain

45.1 History and Social Parameters of the Education System

45.1.1 Corner Stones of the Historical Development

The overall policy of the Spanish education system is reflected in the principles as contained in the legal documents. The legal proposals of the 1930s revealed that the Spanish education system was profoundly inefficient and that it took a long time for the state to accept responsibility for education and training. The state's inhibition, the insufficient number of schools, ideologization, and extreme indoctrination, among other aspects, were changing slowly during the 1930s, 1940s, and 1950s, and at the same time, they initiated a socioeconomic transformation within the Spanish population. Given the gradual expansion of school enrollment and the improvement of the quality of education, the whole framework of education and training began to change for the better.

The 1970s were marked by the beginnings of the freedom of tuition, a principle fostered by the state for reasons of economic and democratic improvement. This decade witnessed a decisive modernization of the educational system: school enrollment in primary education increased considerably, while attendance at non-compulsory schools also rose, hinting at a development that was accompanied by an important improvement of equal opportunities. All this helped to justify the right to education and training as well as the freedom of education and guaranteed ideological neutrality as well as respect of democratic principles of living together. With the passing of the *Right to Education Act* in 1985 (*Ley Orgánica de Derecho a la Educación [LODE]*) and the *Education Act of Participation, Evaluation, and Governance of the Centres of Educators* in 1995 (*Ley Orgánica de la Participación, Evaluación y el Gobierno de los Centros Docentes [LOPEG]*), the abovementioned principles were laid down in Acts that reformed the education system and initiated new approaches to participation, clearly focusing on guarantying the application of the Acts as well as defending the freedom of instruction, as reflected in Article 27.1 of the Spanish Constitution.

The 1990s witnessed a general reform that accompanied the system as a whole with the aim of adapting the structure and the performance of those transformations initiated 20 years earlier. Thus, education was reorganized within an overall perspective, which yielded to the different interest of the pupils as well as to their various needs. The culture of equal opportunities was strengthened. The fight against inequality through compensatory devices, the reduction of social injustice, the development of an educational policy for adults, and the integration of the pedagogy of special needs – these and other developments – are at the root of a kind of culture and education called for by the law.

At the beginning of 2000, the education system in Spain took a new direction, which was caused by global changes focusing on efficiency and competition in education and training. With the *Act of Quality in Education* of 2002 (*Ley de Calidad Educativa [LOCE]*), different educational interests were emphasized, i.e., the culture of quality, the culture of effort and endeavor, and the culture of evaluation. In Spain, the aim of carrying out a culture of quality was met by

Spain

				Grade	Age
	University				
	5 th three cycles (doctoral cycle)			17	23
	4 th the second cycle only			16	22
	3 rd two intermediate cycles	Non- university Education	Higher Vocational Education	15	21
	2 nd intermediate cycle			14	20
	1 st cycle			13	19
	Academic or General Branch	Basic Vocational Education Vocational School		12	18
				11	17
	Secondary School (two cycles)			10	16
				9	15
				8	14
				7	13
				6	12
				5	11
	Primary School (three cycles)			4	10
				3	9
				2	8
				1	7
					6
					5
	Pre-school (second cycle)				4
	Pre-school (first cycle)				3

attempts toward profoundly changing political and economic structures, which were introduced in order to improve the conditions for development and social welfare. As soon as the policy of assessment and appraisal of endeavors was accepted, the culture of effort and endeavor postulated a different basis of reasoning. The culture of evaluation ensured that the preceding cultures were safeguarded and applied in the actual processes of evaluation.

At present, a new process of reform is approaching its final phase with the *Constitutional Act of Education* of 2006 (*Ley Orgánica de Educación [LOE]*). This Act repeals the preceding ones (LOGSE, LOPEG, and LOCE) and intends to simplify the complex panorama of existing norms as well as establishing the general regulation of the Spanish education system apart from universities.

45.1.2 Relevant Stages of Educational Reform and Innovation Measures Over the Past 30 Years

Although institutional rules and educational plans existed as early as in 1812, the first all-encompassing norm which consolidated the Spanish educational system was the *Act of Public Education* of 1857 (*Ley de Instrucción Pública*, known as the *Ley Moyano*). Due to the far-reaching implications of this Act, no other Act was passed in Spain until 1970. The *Ley Moyano* was most influential insofar as it questioned the influence of the church in education, supported compulsory and free-of-charge elementary education, underlined the significance of scientific contents in secondary education, fostered the legal establishment of private and mainly catholic education, and declared the irrevocable incorporation of technical and vocational studies in the curriculum.

Beginning with the 1870s, the Spanish education system may be divided into three important periods:

1. The First Republic (1873–1874), favoring the Free Institution of Teaching (*Institución libre de enseñanza [ILE]*), initiated and supported by Giner de los Ríos, and then the Modern School (*Escuela Moderna*), founded by Ferrer y Guardia (1901–1906)
2. The coup d'état by General Primo de Rivera (1923), which put an end to reformist and innovative ideas of the *Restauración*
3. The Second Republic, proclaimed in 1931, with its promotion of a general and compulsory education and its search of a nonclerical and free school tuition

After the Civil War of 1936, the education system was exploited as the motor of the new ideology and the pattern of socialization employed by the political regime of the dictator Franco with its traditional, patriotic, and catholic character as breeding ground for its infiltration of the Spanish society. Some indications of a political and educational change were to be detected as early as in the 1950s, a development that hinted at the necessity of linking national education and politics stronger than before. The precipitous events of that decade were precisely the cause

of a total and overall reform of the education system, initiated by the *General Act of the Education System* (Ley Villar Palasí or Ley General del Sistema Educativo [LGE-1970]). This Act was regarded as the answer to the new times and needs, proposing a pedagogic modernization of the system by introducing compulsory education from the age of 6 to the age of 14, by attempting to improve the quality of teaching, and by trying to strengthen the links between the world of labor and vocational training.

The Spanish Constitution of 1978 contains many references to the system of education, motivating, as it were, the passing of the *Ley Orgánica* which, later, had to regulate the Statutes of the School Centres (*Centros Escolares [LOECE]*). This Act was repealed in 1985 by the *Regulating Act of the Right to Education* (Ley Reguladora del Derecho de la Educación [LODE]). The presently valid Act is the LOE of 2006, which repealed other Acts, as, for example, the already mentioned LODE, the LOPEG, and the *Act of University Reform*.

45.2 Fundamentals, Organization, and Governance of the Education System

45.2.1 Current Leading Ideas and Principles of Education Politics and Policies

The LOE is based on three principles: First is the necessity to provide an education of high quality for all citizens of either sex on all levels of the educational system. The LOE attempts to ensure that all citizens achieve the best possible development of all their intellectual, cultural, emotional, and social capacities, which implies that they can profit from high educational standards, adapted at their personal needs. At the same time the Act has to guarantee equal opportunities for everybody and has to make available the necessary assistance for the students as well as for the school centers. Second is the necessity for all sectors of the community to collaborate in order to achieve these ambitious aims. The combination of quality and equality of opportunity implied by the aforementioned principle requires an unrestricted as well as a shared cooperative effort. The third is the clear support of the educational objectives as established by the European Union for the following years.

45.2.2 Legislative Framework

Although Spanish is the official language, also other languages are in use in the autonomous communities (Catalan, Basque, Galician). In the communities where Spanish and other regional languages exist side by side, they are both official teaching languages, although not at university level. The actual use of the languages depends on its circulation and on the linguistic policy of the respective community.

The legislative frame of the Spanish education system was laid down in the *Constitution* of 1978 where its main principles are described in Article 27. In addition, four Educational Acts regulate its principles and rights:

1. The *Constitutional Act Regulating the Right to Education* (LODE) regulates the right to education and the freedom of teaching. It fosters the participation of the society in education, and it is responsible for the distribution of teaching positions in schools, which are financed by public funding.
2. The *Constitutional Act of General Arrangement of the Education System* (Ley Orgánica 1/1990 de Ordenación General del Sistema Educativo [LOGSE]) regulates the structure and the organization of the education system (except for the universities) with regard to the general as well as the special needs.
3. The *Constitutional Act 9/1995 of Participation, Evaluation, and Governance of Teachers' Centres* (LOPEG) explains the details given in LODE more thoroughly with regard to its focus on participation, organization, aims, and supervision. It also concentrates on the tasks of governmental bodies of those centers, which are publicly funded in order to adjust them to the regulations of LOGSE.
4. The *Constitutional Act of Quality in Education* (LOCE) deals with the legal framework of the school system from 2002 to 2006, partly altering the regulations laid down in LODE, LOGSE, and LOPEG. This Act supports improvements of certain deficiencies of the topical education system focusing on fostering amelioration of the system as well as attempting further concurrence with the educational priorities of the European Union. With compulsory secondary education in view, the Act presents suggestions which include safeguarding of the academic success, strengthening of the roles of the teams in charge, the autonomy of the educational centers, the professionalism of school organization, and the acceptance of cultural diversity in order to facilitate the academic and social integration of foreign pupils.
5. The *Constitutional Education Act 2/2006* (LOE) was passed in order to restructure and simplify the existing legislative norms. It repeals the prior Acts (LOPE, LOPEG, and LOCE) and declares itself to be the basic regulatory norm of the Spanish education system for all but university institutions. The Act includes preschool, primary education, compulsory secondary education, the *bachillerato* (university preparatory courses of two-years duration), vocational training, as well as tuition in the fine arts, language, physical education, and adult education.

Together with the two following Acts, this Act completes the legislative “panorama” of the Spanish education and training system: *The Constitutional University Act* (Ley Orgánica 6/2001 de Universidades [LOU]) reformed in 2007 regulates the structure and the organization system of the universities. Attempting to improve the quality and excellence of the universities, it repealed the prior *Act of University Reform* of 1983, although it did not change the organization of study courses (EURYDICE-EURYBASE 2013). With the new Act, the state has strengthened its influence on the structure and coherence of the university system while, at the same time, increasing the educational power of the autonomous communities.

It also enlarges the independence of the universities and fosters the necessary channels of communication between university and society. *The Vocational Training and Qualification Act* (Ley Orgánica 5/2002 de Formación Profesional y Cualificaciones) aims at unifying the three presently existing subsystems of vocation and training, i.e., the three regulated branches of vocational training (in institutes), the vocational training for unemployed people, and the continuous vocational training (for active workers, for their retraining, and for continuous apprenticeship). The Act also supports the role of the institute for professional qualifications and the qualifications aiming at the development of professional quality training. The National Catalogue of Professional Training thus becomes the institutional head of the system. It aims to facilitate the integration of professional (vocational) training and the labor market, of lifelong learning, and of the mobility of the workforce and the labor market.

45.2.3 Governance of the Educational System

The administration of education and training has experienced a considerable transformation of its tasks in order to meet the demands of decentralization, which now is the dominant structure in a federal state of autonomous communities. This is why the administration works on three levels corresponding to the responsibilities of administrative structuring:

Central administration is exerted by the Ministry of Education and Science (MEC). It is in charge of the following tasks: the promulgation of the basic norms that express in concrete terms the constitutional right to education, the ordering and arranging of the education system, the decision on the minimal requirements of teaching centers, the general program of teaching, the minimal teaching contents, and the regulation of academic and professional titles which apply in Spain.

The autonomous administration is exerted by the different autonomous governments and their departments of education. They are in charge of the normative regulations, the development of basic state norms, as well as the regulation of all other aspects of the education system on their respective territory, as far as they do not interfere with items reserved to the state.

Local administration is accomplished by the city halls of the municipal authorities and is in charge of all aspects concerning their direct interests, such as the provision of building sites for public school centers and the conservation, the repair, the maintenance, and its costs for preschool and elementary school education. They are also responsible for the enforcement of obligatory school attendance and the provision of educational service.

45.2.4 Funding

The overall budget for education and training in Spain is provided by public sources and distributed by the state administration, by the autonomous and the local

administrations, as well as by families and, to a minor extent, by private institutions. About 80 % of the expenditure for education comes from public sources, while families contribute the remaining 20 %. In 2012, Spain spent 4.76 % of its gross domestic product (GDP) on education (MEC 2013, p. 9). With regard to the funding of school teaching, there are two aspects of importance: the first one is the decentralization of the budget which developed side by side with the decentralization of school education in the autonomous communities; the other aspect concerns the possibility of private school centers to receive public money, as long as they fulfill the minimum requirements set by the state administration. These measures are responsible for the creation for a mixed network of centers, characterized by their respective way of being budgeted: the public centers (title and public budgeting), private schools run by the state (private title, public budgeting, called school centers [*centros concertados*]), and fully private schools (private title and budgeting).

45.2.5 System of Quality Management and Support of Educational Establishments

School centers act autonomously in matters of organization, pedagogy, and economy. The management of public school centers is in the hands of the school council, the staff of teachers, and the team of directors. The organizational autonomy, the pedagogical guidelines, and the management of the public centers are exerted by the managing team and the ruling and coordinating bodies of colleges and teachers. Administration, economic management, and pedagogic organization of public centers and school centers (private title, public budgeting) are regulated by the departments of the government. The director, the school council, and the staff of teachers are in charge of the administration in school centers. Private centers enjoy administrative autonomy insofar as they decide on their own organization. They are free to establish their own bodies of governance and participation. The directors of public school centers are elected by the educational and administrative community. Those teachers who passed a contest of excellence and are in charge of one of the teaching subjects of the center will take part in the selection process, which is carried out according to the principles of equality, publicity, and merit. The representative of the school centers is a director who is designated in accordance with the school council. His or her obligations are similar to those of the directors in public schools, and the period of their mandate is the same. The governing body of the centers consists at least of the school council and the staff of teachers. The staff of teachers represents the body of participation of the teachers of the center, and it is in charge of planning and coordinating, as well as of informing and deciding on all educational aspects of the center. It consists of all the practicing teachers of the center, with the director as president. There are other bodies of teacher coordination with the objective of promoting teamwork among the teachers and of guaranteeing the smooth actions of those who are in charge of teaching and learning.

Universities enjoy economic and financial freedom and function in a similar way. As public enterprises, they are entitled to offer special services and receive remunerations, draw profit from foundations, and acquire and administrate real estate.

The participation of the society in teaching is essential in the Spanish education system. A decentralized education system implies not only that there is a balanced contribution of competence of the administrative bodies of the state, the autonomous communities, and the local services but that social participation is also being fostered, so that the distinctive social agents are represented evenly. There are associations of colleagues on all administrative levels of the education system, which ensure the social participation of all sectors of the educational community. The state school council consists of two more bodies in charge of specific institutional participation: the General Council of Vocational Education and the Coordinating Council of Universities. In the autonomous states, there are the autonomous school councils, while there are also others, as, for example, the territorial, provincial, municipal, local, and other councils.

In addition, other means of participation should be mentioned: participation of pupils is achieved by the delegates of the classes as well as by the association of the delegates. By law, parents have the right to form associations and to intervene in the control and management of school centers and offer their collaboration and participation in educational matters.

45.3 Overview of the Structure of the Education System

45.3.1 Preschool Level (ISCED 0)

The first level of non-compulsory schooling is preschool education for children up to the age six years. It is structured in two cycles: up to three years and from three to six years. The main objective on this educational level is to initiate and further the personal development of the children. According to the LOE, the aim is to offer an education free of charge for the age group from three to six with teachers who have specialized in preschool tuition.

45.3.2 Primary Education (ISCED 1)

At the end of the second cycle of preschool education, compulsory and free education is continued in primary schools for the age group 6–12. This branch is divided in three cycles of two years each. The educational aims of this cycle may be described by the acquisition of basic skills, their strengthening and improvement, as well as by the introduction of more complex tasks. When LOCE became law, some subjects in primary education changed names, as, for example, Knowledge in Natural, Social, and Cultural Media became Science, Geography, and History, while Religion was transformed to Society, Culture, and Religion. The latter offers

a choice between religious or nonreligious character of content. LOE also includes instruction in civics and human rights for the third cycle in primary education. In this area, special attention is directed toward education on the equality of men and women.

45.3.3 Lower Secondary Level (ISCED 2A)

Secondary education is compulsory for the age group of 12–16 years, which is the minimum age for entering the labor market. Although 16 is the final year of compulsory education, the lower secondary level has also a preparatory task, that is, preparing the pupils for education and training on the post-obligatory level. Compulsory education is divided in two cycles, one from 12 to 14 years and the other from 14 to 16 years of age. The second cycle offers a greater variety of subjects accompanied by an increase of 25–30 % of teaching hours. Given the options pupils have, they can choose courses according to their interest in scientific, sociolinguistic, technical, or art subjects. The intention of LOE clearly is to enable the pupils to study the basic elements of culture, especially its humanistic, artistic, scientific, and technological aspects, and by doing so, acquire the habit and methods of learning and studying. At the same time, they prepare for postgraduate studies and for their entrance into the world of labor, and they learn how to deal with their rights and obligations as members of the civic society. The development of LOE also directed at the reform of the core curriculum with the intention of strengthening obligatory subjects, as, for example, history, philosophy, and classical languages (Latin and Greek), at the expense of optional courses.

45.3.4 Special Schools for Handicapped Pupils

The principle of equal opportunity in education for all requires that special attention is given to those groups who suffer from disadvantage because, for example, they live in rural areas, do not attend school regularly, or belong to cultural minority and itinerant groups. LOGSE contains specific parallel programs, ensuring that help is provided employing special forms of organizational and curricular support. One part of it consists in offering scholarships and other forms of study help, as well as further supportive means which render financial assistance to all those who need it.

The education of children with special needs is one of the tasks, which has altered considerably during recent years. By changing the regulations as well as the underlying philosophy, attention has moved from offering purely supportive means to a systematic intervention in educational policy. The basic philosophy of LOGSE is to aim for *normalization* and *integration* of educational principles, introducing the term *children/pupils in need of special education* as an alternative to *deficient*, *incapacitated*, *disabled*, or *handicapped*.

Accordingly, ordinary and extraordinary approaches are being looked for in order to pay attention to diversity so that an adequate treatment of all pupils can be achieved by employing an open and flexible curriculum. The different proposals reach from enlarging the space for options over the whole period of education to introducing a greater diversification of the curriculum during the last cycle. Finally, there is also a scheme of very special attention to diversity, which consists of social guarantee programs, directed at those adolescents who leave obligatory education before the age of 16 and are prepared for a job outside school.

45.3.5 Upper Secondary Level (ISCED 3)

After having finished obligatory secondary education at the age of 16, pupils may begin study courses at post-obligatory levels. The *Bachillerato* is the academic or general branch covering the length of two academic study courses and is structured in four modules: arts, natural science and health instruction, the humanities, and social and technological sciences. Within the period of *Bachillerato*, the LOE focuses on developing necessary capacities such as self-motivation, the habit of reading, diligence, and discipline as essential conditions on the road to academic success. It also expects the development of entrepreneurship together with habits of creativity, flexibility, initiative, self-confidence, a critical attitude, teamwork, and an innovative spirit. After the successful passing of the final tests, students receive the title of *Bachiller*, which gives them the right to take up higher vocational studies, special educational studies, or university studies (for which they will have to pass an entrance examination). The reform of vocational education is one of the most distinguished novelties of LOGSE. It consists of two steps: (1) The basic vocational education as part of the secondary obligatory education (ESO) offers the acquirement of basic tools for a future insertion into the labor market. (2) Specific vocational education as part of the post-obligatory phase is divided into vocational education of a middle grade (ISCED 3), lasting two years, and higher vocational education (ISCED 5b).

The philosophy of the new *Vocational Education Act* is complementary to LOGSE insofar as it suggests three possible branches of vocational education: the regulated (academic) vocational education, the (occupational) vocational education, and the (continuing) vocational education. The vocational education of middle and superior grade is structured in 136 branches which are divided into theoretical and practical modules of education and training. Finally, there are more alternatives in higher secondary education, as, for example, the education for adult persons and education in special subjects (art, music, dance, languages, design), also training for obtaining the license to drive sports vehicles.

45.3.6 Postsecondary (Non-tertiary) Educational Facilities (ISCED 4)

This form of education does not exist in Spain.

45.3.7 Tertiary Level (ISCED 5)

Higher education at the third level of education encompasses university education as well as the nonuniversity education. University education is divided into: (1) a first cycle, (2) two intermediate cycles without grades, (3) two intermediate cycles with grades, (4) the second cycle only, and (5) three cycles (also called doctoral cycle) (ISCED 6). The cycles can also be divided into five branches: the humanities, natural sciences and health, social sciences, jurisprudence, and finally technical education and training.

Nonuniversity education consists of three categories: studies which also lead to grades and titles equivalent to those of university studies, though not offered by universities, such as higher art education or higher military studies, higher vocational studies, and studies for higher technical sports professions, as well as studies for legislative professions, which offer their own grades and titles.

45.3.8 Adult and Further Education and Training

Education and training for adult persons, as part of the principle of continuing or lifelong education, has achieved an ever-increasing importance during the last years. For every adult person over the age of 18, education offers the possibility to acquire new knowledge, to complete it, or to modernize it according to their aptitudes or capacities. Furthermore, in certain cases, persons over 16 years of age may also apply for courses in adult education if, for example, they have contracts of employment that do not allow them to take part in the ordinary education schemes or if they are members of competitive sports teams. This kind of education and training consists of distinct activities, which are part of regulated as well as nonregulated training courses. They also encompass teaching modules, which are to carry out specific aims in order to receive academic or professional titles and provide access to other study courses. Continuing education for adults follows three different tracks: education and training for the administrative branch of education being part of formal education for adults, professional education directed at unemployed persons, and continuing professional education for employed workers.

The Ministry of Education and Science offers two models of education: attendance degree and distance-learning degree courses. The following subjects are taught in attendance degree courses: basic education for adults, professional education, preparatory courses for obtaining access to higher degree courses, Spanish for immigrants, and courses of informal character. The distance-learning degree courses are organized by the Centre of Innovation and Development of Correspondence Education (*Centro para la Innovación y Desarrollo de la Educación a Distancia CIDEAD*) and the National Centre of Information and Educational Communication (*Centro Nacional de Información y Comunicación Educativa CNICE*).

Professional education is in charge of the Ministry of Employment while the annual programs or plans are executed by the general administration or the

administration of the autonomous communities. The objectives of these initiatives consist in increasing the insertion or reinsertion of the unemployed into the labor market by qualifying or re-qualifying that part of the population or by finding out which of the acquired competences gives credit to corresponding certificates. Finally, professional education encompasses all educational activities undertaken by private enterprise and by workers and their organizations, and they are directed toward the improvement of their skills and qualifications as well as toward the continuing training of the employed workers, in order to ensure greater competition of the enterprise and the social, professional, and personal improvement.

45.4 Developments in the Current School System

45.4.1 Transition Between School Levels

Whether pupils are promoted from primary schools to secondary schools, after having finished the three cycles, or not will normally be decided by the tutor. A pupil may pass on if he or she fails more than one school subject but can only repeat one course during the whole period. At the end of the first cycle and at the end of each year of the second cycle of the ESO, all the responsible teachers of a group decide if a pupil is promoted one year or one cycle to the next. The decision is taken collectively. Pupils are not allowed to repeat more than two years in secondary education.

In *Bachillerato*, students who have not passed two school subjects at the end of the year will have to repeat that year. Students who do not succeed in any subject by June may apply for a supplementary exam, which in most autonomous communities takes place in September. The maximum time for students to pass the *Bachillerato* successfully is four years. Student who are successfully evaluated in all subjects receive the title *Bachiller*, which specifies their academic career and their qualifications.

In vocational education, there are two ways of passing from middle to superior level, i.e., the direct and the indirect access. For the first one, the title of *Bachiller* is prerequisite; for the second one, students have to be 20 years of age, although the entrance has been lowered lately to 18, and it includes a qualifying test. In order to complete the vocational education scheme successfully, the middle grade training scheme requires a positive evaluation in each of the professional modules and awards the title of *Técnico*. Those who have received that title may pass on to the *Bachillerato* and enroll in the special branch of education, or they may sit a general entrance examination if they are 18 years of age. Accordingly, the students can also complete study courses deemed necessary by any of the autonomous communities in order to reach the professional qualifications, which apply to a *Técnico*.

The superior vocational training regulations require positive evaluations in each of the professional modules. The title *Técnico Superior* allows pupils to enter the labor market or go to the university.

After having successfully finished the *Bachillerato* or middle grade vocational training, students have to pass an entrance examination if they want to take up study

courses. At the end of their studies, students are awarded the title of graduate, technical architect, or technical engineer, which applies to those who have finished the first cycle of their studies or two cycles with a middle grade of qualification. After the second cycle, they obtain the title of bachelor (*Licenciado*), architect, or engineer. Finally, the students can study for their doctorate after the third cycle and after having finished advanced study courses. This title reflects the academic results of projects and investigation, which have taken place in doctoral courses and modules.

45.4.2 Instruments and Measures of Quality Management

Evaluation of the educational system is regarded as an important means for the improvement of education and the transparency of the system. The evaluation process is applied in many different areas, which is an indicator by itself of the credit given to the importance of this diagnostic tool: it is used for measuring the progress in the learning process of the pupils; for assessing the engagement and activity of the teaching staff, as well as for the educational processes, the directive duties, the performance of the educational centers; and for assessing school inspection and the educational administration. LOE will accommodate its activities to the common regulations of the EU; it will improve the quality and efficiency of the system of education and training. In order to be able to do so, LOE strongly supports all measures of assessment, which help to improve the quality of teaching.

The general evaluation process is in charge of the MES and is executed by the Institute of Evaluation (IE). Being a department of the General Secretariat of Education, this institute collaborates with the respective institutes in the autonomous communities, which are in charge of evaluation in their regions. The IE evaluates several times per annum, it elaborates the State System of Indicators in Education, it cooperates with the respective organs in the autonomous communities, and it is responsible for the coordination of participation of the Spanish state in international evaluation schemes.

Educational Inspection is entrusted with supporting the elaboration of educational projects and the self-evaluation of the school centers, which are considered to be milestones for the improvement of the educational system. At state level the corresponding system is the High Educational Inspection (*Alta Inspección Educativa*), which is responsible for ensuring that the tasks and objectives in teaching and educating and the principles and constitutional norms, as exemplified in Article 27 of the Constitution, are complied with. LOE describes the functions of Educational Inspection and its organizational performance as well as the obligations of the inspectors.

IE coordinates the participation of the Spanish state in a variety of international studies, among which only a few can be mentioned, as, for example, the International Project of Indicators of Educational Systems (INES) and the International Project for the Production of Indicators of Educational Results of Students (Project of International Students Assessment, PISA), organized by the OECD.

Summing up, most of the projects in educational investigation are run by universities, and it is also the universities which gain more than others from financial support of programs organized by the Ministry of Education and Science and from regional plans implemented by the autonomous communities. The university departments are the basic institutes in charge of organizing and developing investigation in their field of research. The Institutes of Educational Science are responsible for teacher training, but they also organize activities in research and educational innovation.

45.4.3 Coping with Special Problems

The approval of the *Education Act*, LOMCE, is justified by the objective data published by international and national studies which have shown that education in Spain needs to be reformed urgently. According to the results (MEC-OCDE 2010a, b; MIPEX 2011; EURYDICE-REDIE 2012; MEC 2013), school education is characterized by:

1. A percentage of early school leavers of 24.9 %, which is twice as high as in the rest of the EU (13 %). This means that one in four adolescents leaves before finishing obligatory without a school qualification.
2. A high percentage of students who have to repeat courses.
3. A high percentage of youth unemployment of more than 57 % compared with other countries with merely 8 %.
4. 23.7 % of the age group between 25 and 29 years who neither study nor work (called the *neither-nor generation*), only surpassed by Israel.
5. Some academic results which are considered to be quite bad and have become increasingly so in the course of the recent years: Spain attained 481 points in the last MEC evaluation (2009), 12 points less than the average OECD results, which again was worse than those attained in 2000.
6. A policy of integration of immigrant students which is only half successful, reaching only 13 out of 31 points compared with European neighbors (MIPEX 2011, p. 12).
7. And all that is supported by an investment is much higher than the average of the OECD and the EU. Spain assigns more than \$10,094 per year to every student in public education. That amounts to 21 % more than the OECD and the EU invest. The investment in education has doubled in the last decade (from 27,000 million to 53,000 million Euros).
8. And last, but not least, university education and training, although presently committed to significant reform within a process of European convergence, which implies the increasingly imminent reform of study courses, seems to be suffering from measures clearly destined to consolidate its quality and efficiency: Among the stumbling blocks are the lack of good organization, excessive specialization, and atomization of knowledge, problems with the organization of teaching and timetables, and shortage and inappropriateness of academic disciplines.

It is expected that, with the application of the future educational reform – LOMCE for compulsory education and LOU for university studies – the most imminent problems will be resolved. The Act concerning compulsory education, indeed, is the main indicator of present-day educational questions. The impact this Act has had is considered to be more crucial than that of the other Acts, insofar as it has advanced progress to the organizational structure and to solving educational problems as well as promoting equal opportunities for the pupils on all levels. In essence, the culture of quality and equal opportunity substitutes the culture of endeavor of the previous Act, the LOCE.

45.4.4 Measures and Instruments for Foreign Pupils from Second- or Third-Generation Immigrant Families

The last available statistics for the academic year 2011/2012 counted 781,446 foreign students in Spain. Although the overall number of students remains at the same level, as does the number of foreign students in post-obligatory education, in elementary education an increase of 10 % can be witnessed, which is probably due to the inclusion of the foreign population born in Spain (MEC 2012). For those foreign pupils who require special education, Spain does not favor only one specific pattern of intervention. Although each autonomous community has developed several special activities, the following are the most frequent:

1. Bridging classes: after their arrival foreign students enroll in their adequate classes where they acquire their basic linguistic competence. Once they gain command of a basic understanding of the language, they continue their studies at regular schools. This model has been adopted in Andalusia, for example.
2. Compensatory projects, programs, and activities: schools, which educate a significant number of foreign pupils, employ these measures. Human resources and additional study material will be given to those students who need it. This is the Valencian model.
3. Mobile support service for immigrant students: this model intends to favor the teaching of the new language, which has to be learned by the students at schools, which have no support team. These teams consist of a number of experts who offer any type of help that has been required by the school. This model is favored by the community of Madrid (Lippke and Schulz 2012).

45.5 New Developments

The current Act on improving the quality of education (LOMCE) bundles a series of measures to allow each Spanish pupil to develop their skills as best as they can within an environment of equal opportunity. This also takes account of the most important deficits and problems within the Spanish education system and is based

on objective data from the evaluations of international organizations. Specifically, this involves the stricter alignment of the system on the education systems within the EU leading to the simplification of curricula, strengthening pupil skills and abilities, flexibility of choice within the system, developing an external statistical and more meaningful system of evaluation, promoting greater autonomy and specialization of teacher training centers, improving the transparency of the results of costing reports, and developing a culture of achievement. All told, this is a bundle of measures that intends to help Spain find its place within an international education system, to improve the education of school children, and to move the country toward converging with European educational objectives in line with the strategy *Europe 2020*.

Thus, the general educational goals focus on:

1. Reducing the drop-out rate and obviating failure at school
2. Reinforcing the conditions to give young people better qualifications and preparing them for work
3. Reducing the number of pupils who repeat a school year
4. Countering educational differences in the autonomous communities, increasing knowledge and skills in key subjects, and prescribing clear objectives for each level
5. Modernizing education at vocational schools
6. Incorporating and strengthening information and communication technologies

To guide all this, LOMCE, as passed by the Council of Ministers in 2013, highlights the following measures:

1. Greater flexibility in educational tracks: the act provides a flexible catalog of voluntary measures to take account of the needs of families and the pupils themselves; decisions can be modified or even reversed at any time.
2. Individual support: *Primary level*: in Year 3, tests identify learning difficulties at an early stage, and in Year 6, teaching staff provides recommendations for the transfer to the lower level of secondary education. *Lower secondary level*: teaching staff consultation at the end of each school year. Year 1: summarizing content learned to ease transition from primary to the lower level of secondary education. Years 2 and 3: programs to improve learning and achievement. Year 3: selecting mathematical subjects based on purely academic or practical teaching. Year 4: election of academic or practical subjects. Courses from the age of 15 in basic *vocational education*; a further certificate following the vocational qualification of level 1 of the *Bachillerato*. *Upper secondary level*: natural sciences, humanities, social sciences, and music. *Middle level of vocational education*: programs to ease transition to other subjects. Plans to foster the development of gifted children. Evaluation of the achievement of pupils with learning difficulties. Technologies to support information and communication.

Culture of responsibility and achievement:

1. For pupils: concluding evaluation of school examinations at lower and upper levels of secondary education in accordance with the European Higher Education Area; flexibility in offering corrective measures educational and healing in nature that respect the rights of pupils and serve to improve mutual relations of all involved
2. For schools: autonomy and specialization; reporting and transparency of results
3. For management and teaching staff: qualified and targeted measures and reporting; strengthening the management function of head teachers
4. For authorities: belief in the truth of statements made by teachers and school management

A parliamentary report of 18 April 2013 takes a positive view of the fundamental elements of the reform (preparatory nature of Year 4 in the lower level of secondary education; programs to improve learning and achievement; basic vocational education; final reports; regulating education in Spanish and the languages of the autonomous regions). Ultimately, a bundle of technical and legal measures will be implemented.

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T. Werler (✉)

Bergen University College, Bergen, Norway

S. Claesson • O. Strandler

University of Gothenburg, Gothenburg, Sweden

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46.1 History and Social Parameters of the Education System

46.1.1 Cornerstones of Historical Developments

Sweden can look back on a long period of peaceful development that has strongly determined the country's economic and educational development. Sweden's empire once covered a large part of the Baltic region. Education in this area enjoyed considerable attention. Toward the end of the 30-year war, for example, Johann Amos Comenius was called to Sweden to assist the establishment of the school system. The period that followed was characterized by territorial loss. The loss of Finland (1809) and Norway (1905) had to be dealt with both socially and culturally. Sweden was not involved in the two world wars.

Like all countries in the north of Europe, Sweden was Christianized in the ninth century. Nevertheless, the old Germanic faith held its own for a long time. By the time of the *Riksdag's* Assembly of Västerås (1527), both the Swedish State Church and the Lutheran Reformation were established. Every Swedish citizen became a member of the State Church at birth. This regulation was only abolished in 1951 and the State Church itself in 2000. This also brought the role of the monarch into question. Even though Sweden was spared from the conflicts of war, the country's identity was characterized by the massive emigration movement of the nineteenth century. In contrast, Sweden experienced a strong influx of immigrants following World War II. Employment immigrants primarily came from Finland, Eastern Europe, the former Yugoslavia, Italy, and Turkey. In the last few decades in particular, the country has taken in refugees and asylum seekers from Persia, South America, and Africa. Sweden is characterized by the ethical and religious influence of Protestantism; there is a strong sense of unity among the various social groups. Politically, the twentieth century was mainly dominated by social-democratic governments. However, their strength was being challenged at the beginning of the twenty-first century by conservative and neoliberal powers.

46.1.2 Political, Economic, and Cultural Conditions of the Current Education System

Covering a geographical area of 450,000 km² and with a north-south axis of approximately 1,600 km, Sweden's population currently stands at 9.6 million; the population density amounts to only about 20 inhabitants per square kilometer. Sami, Finns and Swedes, Jews, Roma, and Tornedalers are recognized as national

Sweden		Grade	Age
		17	22
		16	21
University University College		15	20
		14	19
		13	18
General Secondary School	Vocational Secondary School	12	17
		11	16
Primary School		10	15
		9	14
		8	14
		7	13
		6	12
		5	11
		4	10
		3	9
		2	8
Pre-school Class		1	7
Nursery School			6
			5
			4
			3

minorities. Immigrants from crisis areas are today forming new minority groups. In 2013, 15.1 % of the population were born outside the country.

As in other Scandinavian countries, Sweden’s social, cultural, and economic situation is marked by a relatively strong welfare state. A recession during the 1970s followed on the heels of a 70-year period of constant economic growth.

Between 1950 and 1970, the GDP doubled, while the consumer prices increased by approximately 80 %, and the public sector increased by roughly 170 %. Many families became largely dependent on the state. The Swedish welfare state was mainly developed in a period influenced by social-democratic governments. A social security system was built up that placed particular emphasis on the development of education and training. The bank crisis of the 1990s inaugurated the next recession, which was also marked by high unemployment, increased national debt, and reduction in public expenditure. In 2013, 7.3 % of the population were unemployed.

The zeitgeist of the 1970s was defined by optimism and a belief in the future of the welfare state. A phase of unease, unrest, fear, and pessimism followed with the 1980s. In view of more global risks, the 1990s saw an increase in environmental protection activities. The liberalization politics of the 1990s brought a break with the traditional model of the welfare state in Sweden. Although this stimulated an economic upturn, it also contributed to a widening of the gap in incomes. The expansion of the public sector led not only to the creation of new workplaces but also to the high rate of employment for women.

Sweden has been a member of the European Union (EU) since 1994 and maintains its strong Scandinavian-Nordic identity, stemming also from the linguistic relations with Norwegian and Danish. Sweden was the only country in Scandinavia that had the Nordic languages as part of its education up to 1980.

46.1.3 Reform and Innovation

Compulsory schooling has been existing in Sweden since 1842, and it is largely realized through the Bell-Lancaster method, which results from the kind of settlement and school structure. Rural schools often consisted of several large classes, whereas schools in towns embraced more classes for fewer pupils. Despite the existence of teacher-training seminars, the majority of teachers were not really prepared for the teaching profession. Often enough, they would have to combine their actual profession (as manual worker, priest, etc.) with “maintaining schools.” Education was based on Luther’s Small Catechism, and children were also instructed in arithmetic, reading, and writing. Besides the rural schools, outside the towns there were also the residential adult education centers based on the educational ideals of Nikolai Frederik Severin Grundtvig. Parallel to this, towns offered lower secondary and grammar schools which adapted their services to meet the needs of the growing middle classes.

At the turn of the twentieth century, traditional Swedish education was criticized from within as being too narrow and too inflexible. Alternative notions of educational reform – internationally influenced by John Dewey and Georg Kerschensteiner – gained in significance. Swedish educationalist Ellen Key, who lent her name to the “Century of the Child” project, found a more welcome audience abroad for her concept of child education. Other influential personalities who argued in favor of a restructuring of schools included painter and writer August

Strindberg, authors Selma Lagerlöf and Verner von Heidenstam, as well as Carl Larsson. A significant result of this movement was that schooling at primary school was extended and a comprehensive school established. Furthermore, transfer to the lower secondary school was eased.

In 1946, a school commission was set up whose task was to radically rebuild the Swedish school system. Schools, which were founded in the nineteenth century – consisting of the primary school, secondary school, upper-primary school, municipal secondary modern school, and the secondary modern school – were united in one school form. The introduction of the compulsory 9-year basic school was ratified in 1962. This increased compulsory schooling from 7 to 9 years and the common school was introduced for all pupils. Subsequently, in 1964, the general 2-year grammar school following on from the basic school was introduced. With the integration of the vocational school and the technical college into the upper secondary school (1968), endeavors to standardize the educational system were strengthened. However, due to the reforms in the school system, numerous adults felt confronted by well-trained school leavers; but the educational gaps were lessened by a reform (1967) of community adult education, making it possible for all adults to compensate for their lack of qualifications from the basic school or the upper secondary school. As these reforms were implemented, demand for higher education grew which subsequently placed greater pressure on academic educational facilities.

In the past 30 years, the country has become more urbanized, due largely to developing industrialization. Cities such as Stockholm, Gothenburg, and Malmö have grown at the expense of the villages; the social-economic structure of the rural regions has been characterized by migration. This has been a major challenge for Swedish educational policy, which has had to react to the growing need for teachers and to the cultural challenges presented by pupils and their families from other cultures. An indirect consequence of these developments can be seen in the fact that the expansion of the school system has led to an extended period of training for teachers. However, this has not met with a parallel rise in the esteem of teachers in society – in contrast, teachers have been continually losing status over the last 40 years. This is reflected, among other things, in the fact that education students now come from all sections of society, whereas in the past they mainly came from the upwardly mobile middle classes. There are hardly any teachers from a migrant background. The relationship between parents and school has also changed. While in the 1970s the “harmonization of home and school” had a major influence on the shaping of schools, this is hardly the case today. Since 1990, parental influence has risen significantly given the free choice of school.

The introduction of the basic school and its new curriculum in 1962 gave rise to a debate on educational ideals: Should schools serve traditional-humanistic education or natural sciences? The question remained unanswered, due largely to a fundamental change in the educational landscape. Swedish education changed toward an empirical-psychological research tradition. Since then, the educational ideal of the basic school has been determined by dialogue-pedagogy and cognitive approaches. A further important reform took place in 1975/1976. Schools were encouraged to

change their image by using new working methods and an amended allocation of resources in order to facilitate greater democracy and equal opportunities in the classroom. Pupils were encouraged to learn the role played by war and conflict in relation to other types of aggression and violence that they experienced themselves, for example. These efforts were strengthened by the curriculum introduced in 1980. This was characterized by a strong belief in objective knowledge and targets a democratic society that was based on the awareness of the significance and causes of social differences. Within Swedish education, this period was characterized by concepts such as “progressive,” “reconstructive,” and “child-centered,” and pupils were regarded as active and creative players.

46.2 Fundamentals, Organization, and Governance of the Education System

Up until the beginning of the 1990s, Swedish education was characterized by the motto “One School for All.” All pupils were to be given the help they needed to achieve the goals of the curriculum. Although the education system was characterized for a long time by a belief in formal education, this notion changed at the beginning of the twenty-first century.

The new national curriculum of 2011 covered the 9-year compulsory school, the Sami school, the special school for mentally disabled children, and the school for pupils with impaired hearing, vision, and physical disabilities; a new curriculum for the upper level of secondary education was passed. The curriculum defines the basic national values of Swedish society and describes basic school objectives and guidelines. These values are the inviolability of human life, the liberty and integrity of the individual, the people’s equal worth, the equality of women and men, as well as the solidarity with those who are in need of protection.

46.2.1 General Principles, Current Educational Policy, and Goals of the Education System

As political power changed at the beginning of the twenty-first century from a social-democratic to a conservative government, the fundamental consensus was not preserved. As far as educational policy is concerned, the social-democratic work of the school commission on the development of schools was abolished in favor of neoliberal ideas. New developments broke with the old paternalistic concepts of the welfare state, to be replaced by feminist and individualist notions. Furthermore, the politics of decentralization were emphasized. Consequently, responsibility for schools was transferred from the state to the municipalities.

One of the most significant aims of Swedish educational policy is to provide a school system that offers all pupils the same access and the same teaching and learning conditions without this being influenced by their place of residence and their cultural background or by social and financial prerequisites. Every school

throughout the country should manifest the same standards. Schooling is provided with the aim of conveying knowledge and skills in cooperation with the parents to bring pupils up to become responsible individuals and members of society. Particular emphasis is placed on equality between genders and an upbringing that avoids racist behavior.

46.2.2 Basic Legal Principles of the Education System

Riksdag (parliament) and the government take responsibility for the educational system. These two political bodies define the general objectives of and guidelines for schools. Decision-making is decentralized to a great extent. All facilities in the education system are under the supervision of the Ministry of Education. The Education Act of 2010 and the curriculum for compulsory schooling, preschool, and the extracurricular center form the basis for all education activities. The main differences to earlier curricula lie in new requirements concerning knowledge and national education standards. Individual curricula are determined by the Ministry and contain aims and core content for Years 3, 6, and 9. Teachers and pupils determine the most suitable learning methods themselves.

46.2.3 Managing the Education System

The decentralization of key levels of decision-making means that each municipality acts as the employer for school staff and is responsible for their continued education. The task of the municipal council is to design a school schedule. This plan must contain the development and academic schedule of the local schools on the basis of the national curriculum. In addition, measures by which the municipality intends to accomplish the nationally predefined objectives must be shown. Every school is obliged to draw up an individual working schedule; this determines the schedule and organization of everyday school activities. Teaching objectives are determined in cooperation between teachers and pupils. Individual needs and studying-learning prerequisites form the base for these objectives. Maintaining bodies – either independent or public – has to work continuously on assuring the quality of school achievement.

Three central administrative bodies have been set up to govern and control education: the central school authority (*skolverket*), the state quality assurance authority for higher education, and the council for quality assurance of university programmes. Covering different areas of responsibility, the institutions accompany and evaluate the activities of school and higher education facilities. However, the *skolverket* is responsible for all forms of school.

The *skolverket* continues to be involved in school development, the initial and in-service training of teachers, producing comments and reports to the *Riksdag* and the government. Statistical information (e.g., number of pupils, pupil-teacher ratios, budget, costs, etc.) on all schools is regularly collected by the *skolverket* to facilitate

both internal comparison and quality control. The *skolverket* is responsible for governing education in line with criteria determined by the legislature. This includes the permanent review and adaptation of curricula and criteria for the award of grades and by defining national objectives. This work is guided by the principle of creating greater equality of opportunity. The authority defines the criteria required to establish an independent school and checks whether these have been met. Furthermore, the *skolverket* has monetary control instruments at its disposal with the allocation of funds (from municipalities, individual schools) based on previous evaluations. Results of evaluations are published and may be significant in the parental or pupil choice of school.

46.2.4 Funding the Education System

The financing of the schools is shared between the state and municipal levels; universities are funded by the state. A state subsidy is at the municipalities' disposal for self-administration and it is up to it to develop its own system of distributing funds in the municipality school committee. This subsidy, which supplements municipal tax income, must be used to ensure the upholding of general school standards (buildings, teacher salaries, materials, etc.) and not for organizational purposes. Schools receive a defined sum of money for each pupil that they have to pass on should the pupil change schools. This principle has stepped up the competition between schools which has not only led to school specializing but also to some schools closing. This has affected rural regions in particular where schools have to cope with comparatively high costs and have few options to counter pupil migration to the cities because they have to meet a basis level of provision. Special subsidies are awarded by the state for the in-service training of school staff and for support programmes to help slower-learning pupils. Every municipality is obliged to support financially government-approved private basic and upper secondary schools.

Attendance at state primary or basic and secondary schools and at state universities is free of charge. For pupils at the basic school, learning materials, school meals, medical supplies, transport, and Swedish lessons for immigrants are all free of charge. This also applies to most secondary schools but not to private schools. In the preschool, 525 h are free of charge. Parents have to assume costs for transportation and meals. Because preschool education is organized as part of the school system, every municipality is obliged to provide this although attendance is voluntary. The participants in adult education facilities must cover the cost of materials. Pupils at both the secondary school and the adult boarding school receive financial assistance from the ages of 16–20.

46.2.5 Relationship Between the Public and Private Sector

Alongside municipal schools, Sweden also has a number of private 9-year basic schools. They must be approved by the *skolverket* based on rules developed by the

Riksdag and the government; the conditions of the Education Act and the curriculum (values, objectives) must be fulfilled. Parents (and pupils) are free to choose a form of school. If the financial and organizational expenditure for the municipalities are considerable, financing the attendance of a private facility may be refused. Private schools are not entitled to charge fees. Some schools make use of leeway provided by the legislature to establish special profiles. The privately owned education sector is growing, focusing mainly on the secondary schools. There are no privately organized institutions of higher education.

46.2.6 System of Quality Development

Educational developments in Sweden are accompanied by inspections. While the form inspections take have changed over time, the state holds overall responsibility for them. The central school authority or *skolverket* is actually responsible for conducting the inspections. Even though it holds the main responsibility for assuring the quality of educational provision, the municipalities and the individual schools themselves have also set up their own systems of control. These systems may vary considerably among the municipalities and from one school to the next both in terms of the methodology applied and the significance assigned to the results.

Inspections are conducted every 6 years. The key objective is to map the current situation at the school and to sketch an overall picture of the educational situation in a municipality or school in relation to national aims. Results help determine specific requirements or recommendations to improve the quality of the school. Inspections place particular importance on knowledge and development; learners, standards, and values; and governance, management, and quality. While the first area surveyed examines agreement of school-based work with national guidelines, the second area explores the ethical educational work of a school. The survey questions head teachers, teachers and ancillary pedagogic staff, school nurses, and pupils and their parents. The survey also includes the opinions of local politicians, observes lessons, and looks at the wider school environment. National tests are carried out in Years, 3, 6, and 9 and in the secondary school, in Swedish, Swedish as a second language, mathematics, and natural and social sciences.

46.3 Overview of the Structure of the Education System

Sweden can look back on a long tradition of common schooling of all children and does not recognize the conventional division between primary and secondary sectors of school. The basic school (*grundskola*) comprises the more traditional comprehension of primary school and lower secondary education. The *gymnasieskola* is the upper secondary school.

Pursuant to the Education Act, all children should enjoy equal access to school and education regardless of gender and socioeconomic background. At present, this

means that all schools should apply information and communication technologies and that educational provision should be accompanied by measures to ensure equality between genders and develop tolerance toward other cultures. Compulsory schooling lasts 9 years, but most pupils stay on significantly longer. This applies both for extending schooling to include attendance at preschool and attendance at the 3-year secondary school. Many pupils continue their education in the tertiary sector.

Voluntary attendance at a preschool facility for children under 6 is the first stage of education and assumes the function of nursery school. Still outside the area of compulsory schooling, each municipality is obliged to set up a 1-year preschool class for 6-year-olds. Sweden's public compulsory school system comprises the 9-year basic school, the basic school for Sami (*sameskola*), the special school for children who are developmentally challenged (*särskola*), and the special schools for the hard of hearing (*specialskola*). Afterward, pupils learn at a general or vocational upper secondary school, *gymnasieskola* and *gymnasiesärskolan*. There are also private facilities in both basic and upper secondary sectors of education. In 2010/2011, nearly one in four citizens participated in one form of education or another. In autumn 2012, an average of 85.7 % of all children aged between 1 and 5 years (482,000) was looked after in a preschool facility, 5 % attended a family day-care center. In the voluntary preschool year introduced in 1998, there were 106,000 6-year-olds or 96 % of the age cohort. Parallel to this, 85 % of this age group attended after-school programmes. The basic school represents the greatest organizational school unit, having approximately one million pupils. Nearly 99 % of all pupils (between 7 and 15 years of age) attend it. About 102,000 (10 %) of all school-age pupils attended private schools. In 2011, the upper secondary school was attended by 369,000 pupils. Nearly all pupils (98 %) who had completed the basic school continued their education at an upper secondary school. At the beginning of the 1990s, this interest in upper secondary education was approximately 80 %. Whereas 6.5 % of all people aged between 20 and 64 attended a programme in municipal adult education in 1998–1999, by 2011 this had sunk to just 4 %.

46.3.1 Preschool Education

Although nursery schools have existed in Sweden as long ago as the nineteenth century, their broad social implementation changed during the 1970s. Various legal provisions served to improve integration between the elements of the nursery school and the basic school. Each municipality is obliged to provide all 1- to 5-year-old children with a place in preschool education (partially funded by fees). All children from the age of 4 years should be offered at least 525 h of free educational support and care.

The preschool activities are usually carried out by the preschool facility (*förskola*). The offers may thereafter be made to parents by the public preschool or the family day nursery. The curriculum for compulsory school was extended in 1998 to the nursery school in order to safeguard the connection between the nursery and the basic school with regard to lifelong learning. Nursery school education aims

to promote the development and initiative of children through group activities and playful discovery, thus generating favorable start to school-based learning. Educational support is carried out in cooperation with parents, giving them the opportunity to continue working. Each preschool facility is obliged to support the linguistic development of the child – in Swedish and its mother tongue – to ease the transition to the basic school. If a child is in need of additional support, each preschool facility is obliged to take the necessary steps to provide it. In “development talks” teachers discuss the development of the child and possible problems with its parents at least twice a year. Municipalities are responsible for assuring the quality of preschool activities in terms of suitable staffing, of group sizes and composition, as well as of rooms and their space.

The vast majority of 6-year-olds in Sweden attend the free preschool year established in 1998. This is a voluntary year within the public school system. Each 6-year-old has a place in a preschool year up to the beginning of their compulsory education. It offers at least 525 h of educational support and care. Unlike general preschool, this preschool year offers standard lessons. Since the municipality takes the responsibility for this class or school, it is also included in the local school scheduling plan. The preschool year is meant to safeguard the integration between preschool and the compulsory school system. In a playful manner it prepares pupils for future mathematics and reading lessons. If special education measures are required to meet the requirement of the basic school, these have to be offered. Children who attend a preschool year have the right to attend educationally organized leisure time care.

46.3.2 Basic School (*Grundskola*)

All children have to attend school in the year in which they turn 7. It is also possible to start school earlier. Attendance is obligatory and free of charge – this concerns learning materials, school meals, medical care, and school transportation. There is no internal streaming by ability. During the whole period at school, each pupil is guaranteed a defined number of contact hours.

This has dissolved the previous 40–60-min rhythm of school lessons. Now, schools are free to organize the school day and teachers as they wish. About 6 % of the guaranteed time may be chosen by the pupils to consolidate specific topics which are of special interest to the pupil. They normally choose classes in music, culture, natural science, languages, and sport. However, it is fair to add that every school does not have a full range of topics; instead each school has its own profile, thereby narrowing down the choice for their pupils. In the context of these electives and by the increase or reduction of the time for certain other subjects (+/–20 %), it is possible for every basic school to develop an individual profile. On the basis of the profiles, which are defined in the local school scheduling plan, parents are able to choose an appropriate school for their child. While this is a real option for families in big cities, in reality most pupils in rural areas cannot choose between schools.

The electives chosen by the pupil can be entered in his or her development plan compiled by the class tutor in conjunction with the pupil and the parents. The plan is intended to serve as a learning tool for each pupil. The plan also describes the pupil's learning level, interests and strengths, and developmental progress. In an annual parent-teacher conference, the development of the pupil, including his or her knowledge, the social level of competence, and the goals the pupil has to accomplish are discussed. On parental request, the report may be presented in writing.

The grading system was reformed and since 1995 is based on three levels: G (satisfactory), VG (good), and MVG (very good). The new scale for test marks ranges from A to F, with criteria having been defined for marks A, C, and E. Marks are now awarded from Year 6. At the end of compulsory education, a leaving certificate from the basic school is awarded. This is given if either compulsory education ends or the pupil has finished Year 9 with at least a "satisfactory" grade. Almost all marks are awarded either on an interdisciplinary basis or by individual subject teachers. All pupils at the basic school move automatically to the next form in the following school year. There is also the possibility for the head teacher to move a pupil up or down. The leaving certificate entitles the pupil to attend secondary school.

Developments in basic education are determined by two factors: the general fall in the population and the rising interest of parents in alternative educational services. In 2006 there were a total of 4,872 basic schools, a drop of 36 schools compared to 2005. In autumn 2010, 741 schools (16 %), of a total of 4,626 schools, were privately maintained. In autumn 1991, there were only 66 private schools. While the number of alternative institutions has risen gradually, the number of municipal schools has dropped. In 2012/2013, 13.3 % of pupils attended an independent basic school.

A significant principle of Swedish education is the integration of pupils with learning difficulties (physical or psychological) in normal schools. Both the Education Act (§ 6) and teaching curriculum envisage special measures for pupils with learning difficulties. The school (in particular the head teacher) is responsible for ensuring that these pupils receive the appropriate support to help them pass exams in Years 6 and 9. The measures necessary for this are not defined by the state; it is only prescribed that they must be offered. Forms of assistance may vary, from technical instruments to teachers trained especially to work with pupils with learning difficulties. Only pupils with severe hearing impairments should be taught in a dedicated school (*specialskola*). If, despite all the support, pupils cannot follow normal lessons, they may attend a special school (*särskola*). Sami-speaking children are entitled to spend the first six school years at a special basic school for Sami (*sameskola*). After this time the children have to attend a regular basic school. The curriculum for the *sameskola* aims to help pupils become familiar with their Sami cultural heritage. They also learn to read, write, and speak Sami.

Pursuant to the Education Act, schools have to organize comprehensive medical, psychological, sociopsychological, and special educational care for pupils. The aim of health care is to provide physical and psychological protection during the pupils' time at school.

In the basic school, Swedish, mathematics, and English are particularly emphasized. This applies not only to the number of lessons but also to the quality of programmes offered. The introduction of English lessons is determined by the municipality. Second foreign languages offered are German, French, and Spanish. Pupils with immigrant backgrounds are given the opportunity to learn their mother tongue more deeply as the second foreign language. Sign language can also be taught.

46.3.3 Upper Secondary School (*Gymnasieskola*)

Upper secondary school attendance is voluntary and free of charge. According to the Education Act, every municipality is obliged to offer upper secondary classes to pupils who have completed the basic school and not yet turned 21 years of age. In 2012/2013, 235,307 pupils attended such a facility. Older pupils may take part in community adult education programmes. All education at the upper secondary school is organized into 18 national programmes; 6 of them prepare pupils for university, while the remainder are vocational in nature.

All national programmes are divided into one or several areas, which consist of three blocks, eight core subjects, and programme-specific subjects. Core subjects include Swedish (Swedish as second language), mathematics, English, community education, religion, science, art, sport, and health education. Furthermore, all pupils have to take part in project work. In the second year, most national programmes offer some kind of specialization. Some programmes include a 5-week component at a place of work. An individual programme can be established in cooperation with local facilities and may be offered to pupils with learning difficulties. Pupils who have not completed the basic school can take part in an introductory course. In collaboration with the pupil, schools develop an individual educational programme for the pupil's entire school career.

The system of courses and the lack of a national schedule mean that every upper secondary school can organize its own educational programmes freely. All pupils have the right to attend an upper secondary school, even in another municipality if its programme is more in tune with the pupil's wishes. Pupils are also entitled to attend private upper secondary school; however, the content offered is largely the same as that in municipal schools.

The aims and guidelines for upper secondary education are defined in the curriculum for voluntary forms of school. These aims include:

- To convey a broad area of knowledge, to develop analytical skills, and to acquire an understanding of academic methodology
- To develop skills useful in professional life and across the lifetime of a person
- To develop an understanding for Scandinavian languages, including Sami
- To convey the key elements of the western cultural heritage

Pupils with learning difficulties due to physical or psychological limitations can attend a 4-year programme at a secondary special school provided they are younger than 20 years of age when they start; older pupils can attend the local municipality's *särvtux* system. Courses are organized in both national and bespoke programmes and comprise a total of 3,600 h over the 4 years.

The grading system is by and large in line with the aims and guidelines of the curriculum using grades A–F. Standards for A, C, and E have been defined. Current discussions focus on why pupils receive better grades each year compared to those who left school in the past. There is no final examination at the end of a pupil's time at school. To receive their certificate of upper secondary education, pupils have to attain at least 2,250 from a possible 2,500 points. Pupils only receive their school leaving certificate, if they have passed both the taught programme and the certificate project. The completion of a programme serves as admission to higher education.

46.3.4 Post-secondary and Tertiary Education

About half of Swedes aged 24 and over begin a study programme at university and college; roughly 84 % of pupils completing upper secondary school take up a course of academic study. Females account for over half of the student population. At the universities and colleges, students may choose between single courses or programmes (BA or MA). Two-year programmes culminate in the university diploma, for which 120 ECTS are required. Three-year programmes can be completed with the bachelor's degree, and 180 ECTS are required. These courses can be supplemented with a 1-year master degree (60 ECTS) or a 2-year master degree (120 ECTS).

Generally, admittance to universities and colleges is based on the leaving certificate from the upper secondary school. However, it is also possible to apply for a place at university based on the results of an entrance examination. Roughly 60,000 people made use of this channel in autumn 2013. The study programmes' relevant qualifications are tested. In the year 2010/2011, nearly 200,000 persons took part in municipal adult education, most of whom (165,207) attended courses leading to the upper secondary school certificate; 32,965 people attended courses leading to the basic school certificate.

46.3.5 Teacher Training

Sweden has had state-run teacher training since 1862. Usually, this education took place at teacher-training seminars, with the original responsible body being the Church. Up to 1952, teachers were not employed in Swedish schools if they did not belong to the Church. Since 1977, teachers are trained at universities or colleges of higher learning. Reforms passed in 1988 meant that basic school teachers were trained as subject specialists. A teacher-training reform was conducted in 2002 and

included all kinds of teachers. The reform was yet another effort to connect different kinds of teachers to each other to, in the end, better support pupils' learning. This meant that students who intend to teach adults are in the same group of students who, for example, are going to teach children in preschool. All kinds of students attend the same courses independently of what type of teacher they wish to become.

The last reforms initiated by the conservative government in 2011 aimed at introducing a differentiated form of specialist teacher training. Accordingly, teachers were trained for preschool, for primary school, for the lower level and upper level of secondary education, and for vocational education. A central element of all programmes is the subject education (60 ECTS) that bundles a myriad of issues. Depending on the choice of subject, teacher-training programmes for the basic school last between 4 (240 ECTS) and 4½ years (270 ECTS). Training for upper secondary education teachers lasts between 5 and 5½ years (300/330 ECTS).

46.4 Developments in the Current School System

The conviction that education is a fundamental right of all citizens, to be upheld by the state, developed in the era of the welfare state. The current and ongoing movement away from a state-controlled education system to one that is more subject to market forces has thus to be seen in this light. At the same time, current changes are also being seen as an adaptation to non-national processes (Europeanization), threatening national identity. In the last few decades, Swedish educational policy has been characterized by concepts such as integration and adaptation. Consequently, both preschool and upper secondary education have adapted to developments in the basic school. Even the class tutor tradition has been adapted to the notion of specialist teachers. While hardly any more problems are likely to occur in the transition from one type of school to the next, the same cannot be said for higher education.

46.4.1 Transition Between Levels of Education

Despite the relatively high and, from a historical perspective, stable rate of transition from the basic school to the upper secondary school of 98 %, the transition phase is seen as risky from the viewpoint of the basic school and the upper secondary school. Pupils from migrant families are more likely to leave school than Swedish school children. The basic school claims that the upper secondary school is not doing enough to motivate young people to attend upper levels of school. The counterargument is that the quality of basic school education is uneven in socio-geographic terms leading to fewer interested pupils.

In 2003, 43.6 % of pupils who left upper secondary school with a certificate began a university course within 3 years, a fall of 1 % compared to 2000. More and more females are now studying at university. While 49 % of women who left school

in 2002/2003 took up a university programme within 3 years, the rate for men stood at just 38.2 %. Many more pupils who followed natural or social science programmes at the upper secondary school go on to study at university than pupils who followed other programmes (80–57.3 %). It is also striking that 48.3 % pupils from migrant families take up a place at university compared to 42.9 % of children from Swedish families. A similar distortion can be found with pupils from rural areas (33 %) compared to pupils from urban environments (49 %). This trend is to be countered by a number of programmes, all of which have one topic in common, broadening the recruiting basis thus raising the number of students.

A key step in this direction was taken by the reform of upper secondary schools. The intention is to establish 19 national programmes, 14 of which are to prepare young people for professional life and 5 for higher education study. Vocational programmes are to be associated much closer to the tradition of apprenticeships, reflected in the nature of the examinations. Such students will no longer have access to university study.

46.4.2 Quality Development and Assurance

National examinations aim to measure the effectiveness of schools and their quality. The examinations, which take place in Years 3, 6, and 9 as well as in the upper secondary school in the core subjects, Swedish, English, and mathematics, have caught the public eye, allegedly making a good school visible. This leads to a paradoxical and unfair situation: While parents simply have to select a new school to solve a problem, the school sees its task in using the diagnostic materials available to it to improve its quality and effectiveness. These examinations also aim to encourage schools to ensure that all pupils meet learning targets, that the strengths and weaknesses of a school become clear, that criteria for grades can be developed and improved with the help of the examinations, that a fairer assessment is possible based on the same criteria, and that at both school and national level, it can be seen whether learning targets have been met or not.

46.4.3 Dealing with Special Problems

One of the issues that characterizes the Swedish school, in principle the result of a society striving toward consensus, is the lack of discussion on topics such as early school leavers or school year repeaters. Problems are experienced in other areas. Swedish education legislation envisages that pupils with learning difficulties are given sufficient support to enable them to take part in normal schools and normal lessons. As a rule, special-needs teachers are to help subject teachers achieve this, but given the lack of the former, this can often not be realized. For pupils affected by this, schools can adapt their programmes (reduced timetable, internships) which basically boils down to internal streaming and ends with an incomplete leaving certificate from the basic school. Subsequently, these pupils are not entitled to

attend upper secondary school. However, drawing on the traditional principle of equality in education, similar regulations are now being applied to the upper secondary school.

A general issue being debated at present and highlighted by the media is that of bullying. This problem became visible when several pupils committed suicide in relation to bullying. Various parental and pupil initiatives are demanding that the municipalities do something to counter the problem. At present, municipalities are trying to find suitable measures to prevent pupils staying away from school because of bullying. However, objections have been raised to these measures on the grounds that they only handle the symptoms with the fundamental question of the democratic cohesion of schools in times of increased competitive pressure remaining unanswered. In the short term, the methods applied did bring about some improvement, but it does seem that the long-term effects of anti-bullying campaigns are not having any true impact (Frånberg 2003).

46.4.4 Measures to Integrate Pupils from Immigrant Families

Since World War II, Sweden has experienced a number of waves of immigration, each calling for new social and cultural solutions. At present, roughly 15 % of all pupils in the basic school are from migrant families. All pupils have the right to be taught in the mother tongue if they speak a language other than Swedish at home. This concerns about 6 % of all pupils. Even the curriculum expressly stipulates that pupils have the right to master their respective mother tongue. Such mother tongue instruction can take place in addition to, or be integrated in, the normal school day. These pupils also have to attend lessons in Swedish and English, both in the basic school as in the upper secondary school. Their parents also have this right. Pupils are therefore given the opportunity firstly to consolidate their mother tongue and acquire a level of bilingualism and, secondly, to gain a double cultural identity and cultural competence. The right to this mother tongue instruction is however restricted to 7 years (basic school) and in reality hinges on the availability of suitable teachers. Most of the time, groups are too small (fewer than five pupils) and are not financially viable.

46.5 New Developments

Swedish society is currently experiencing the demise of the traditional welfare state and its notions of security. Seen from outside, the country is being increasingly influenced by a global commitment. This has given rise to debates on nationalism versus internationalism, an open society against a society closing its doors, solidarity versus self-interest. Furthermore, Swedish education finds itself confronted with the notions and practice of a neoliberal educational policy and the current debate spotlights the fall in results of international tests such as PISA. Questions have been raised publicly about whether the numerous neoliberal reform projects that have

been implemented since 2006 (competence-based curriculum, earlier grading of pupil achievement, increased and centralized school supervision) have been key factors contributing to the test performance of pupils. Questions of decentralization and privatization and the shifting of responsibility for schools from the state to the municipalities will probably be the subject of upcoming educational policy conflicts. For its part, the conservative government makes reference to the specialist knowledge of teachers in relation to pupil performance and therefore highlights the significance of teachers' knowledge.

46.5.1 Prospective Implementation Strategies

Another question occupying educationalists arises in connection with the upper secondary school. Questions raised typically deal with whether all pupils have to attend this type of school and whether or not there should be other options, such as elite schools. The government is intending to split upper secondary school into a practical/vocational facility and a theoretical part (SOU 2008, p. 27). Where this is possible, elite classes are to be established. The background to this is that an ever increasing number of pupils are making use of individual programmes to distinguish themselves from other pupils. Obviously they are accepting that income gaps are going to widen in the future and that some pupils will be able to attend university, while others not. There are no larger research and implementation projects taking place in Sweden at present.

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L. Criblez (✉)
University of Zurich, Zurich, Switzerland

47.1 History and Social Parameters of the Education System

47.1.1 Cornerstones of Historical Developments

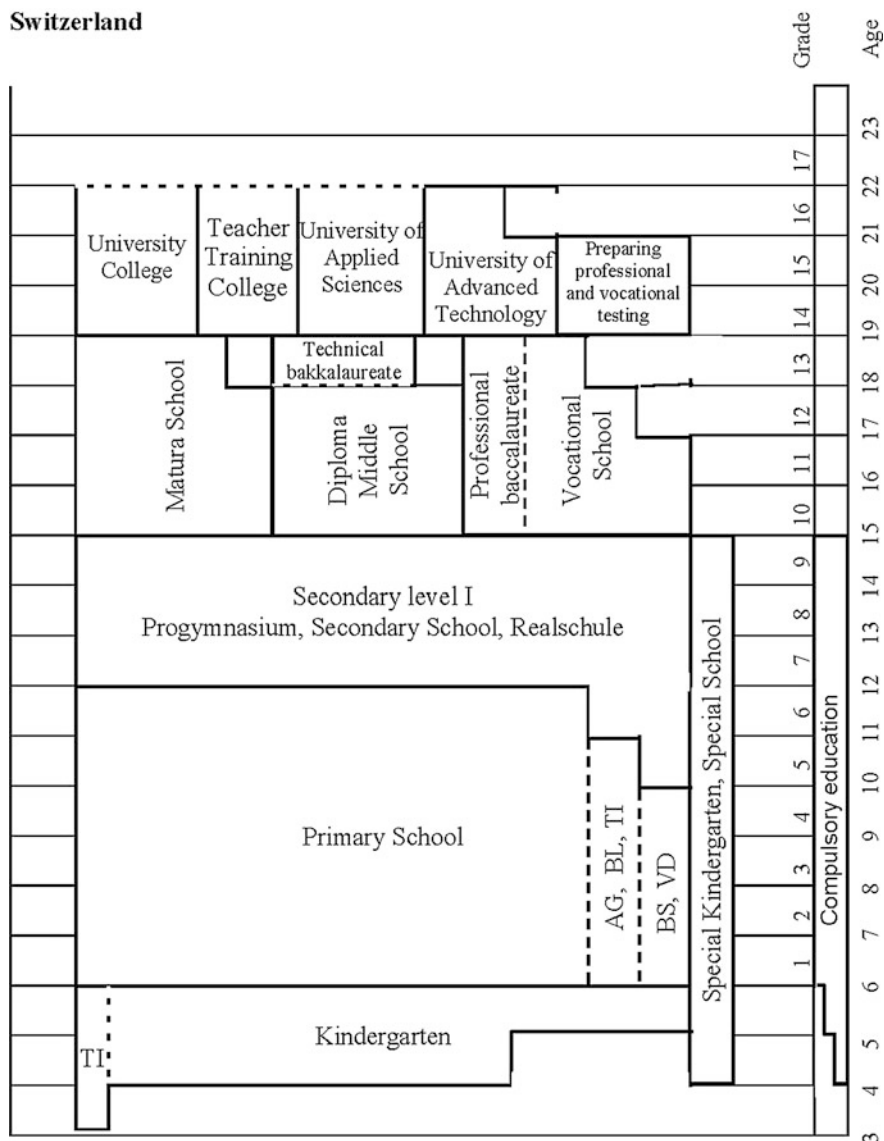
The basic structures of the Swiss education system came into being in the nineteenth century. Whereas the central ideas, developed from the body of thoughts of the French Revolution, were conceptualized during the Helvetic Republic of 1798–1803, they were only marginally put into practice at that time. It was only after 1830 that these ideas began to influence significantly the development of the education systems of the cantons: education for all, admission to higher education based on performance, abolition of class or birth privileges in the education system, and the orientation of the school along the lines of the scientific canon instead of religious confessional dogma. The school systems of the seventeenth and eighteenth centuries, characterized by great contrasts between towns and rural areas and by a strong interweaving of state and church authorities as well as by great differences based on social origin and gender of pupils, slowly became secular and were brought into a legal framework and organized at a canton level (Criblez et al. 1998; Jenzer 1998). Expansion and differentiation of the system are the basic immanent development processes, which describe the long path of the “schooling” of society, which, at the beginning of the twenty-first century, does not seem to have been completed.

Attempts to introduce a unified education system during the time of the centralized Helvetic state (under a French protectorate) failed (Bütikofer 2006). In 1803, the cantons again took over the official control of the education system. On this basis, the education systems were developed following revolutionary upheavals with a short period of time at a canton level, under mutual scrutiny, but not based on common consultation. This remained the case even after the foundation of the federal state in 1848, as the state was only given the competence to establish a university and polytechnic school. Education was divided into five parts: primary school, secondary school, teacher training, grammar school, and university. After the guilds had been abolished for economic reasons, there was no more systematic vocational education.

The implementation of compulsory school attendance was attempted as early as in the first three decades of the nineteenth century as a sociopolitical measure against the employment of children in factories, which only truly succeeded nationwide in the first half of the twentieth century. While school attendance had been declared mandatory countrywide in the revised federal constitution of 1874, the cantons introduced it in part as early as the seventeenth and eighteenth century with the national school regulations. School attendance time was slowly expanded: first, from winter school to the whole year, while the number of years of attendance increased at different paces in different cantons (yet for girls not as quickly as for boys).

The federal constitution of 1874 provided that primary school teaching be adequate, compulsory, free of charge in public schools, and under the control of the state (Criblez and Huber 2008). Public schools had to be attended by all children

Switzerland



independent of their religious denomination. The federation had the option to take appropriate measures against those cantons that did not fulfill these obligations. In 1882, a referendum failed to introduce a federal school inspector (controversially called the *Schulvogt*, the school bailiff), who was supposed to document the development of the schools in the cantons. After this, the cantons were relatively autonomous in determining their school systems.

After 1830, secondary schools, built onto the primary schools, were created in the cantons under a variety of names. Mostly, they were called *Sekundarschule*, but also *Bezirksschule* (district school) or *Realschule*. With the establishment of vocational education in the 1880s, the secondary school's general educational function complemented by the function of helping pupils prepares for the working life. The gradual extension of the compulsory school attendance led to the development of an upper primary level. At the lower secondary level, a hierarchical and functional three-tracked school system emerged, comprised of longer-term grammar school, secondary school, and an upper primary level (*Realschule*) with the respective key aims of preparing pupils for the general qualification for university entrance, for a vocation, and for integration into the working life.

After 1830, the upper secondary system was restructured. The grammar schools (*Gymnasien*) were primarily based on the neo-humanistic educational model. However, a debate on the principles of humanistic or realistic education in the first half of the nineteenth century led in various cantons to the creation of the first vocational training institutions at the upper secondary level with an emphasis on the natural sciences or vocational orientation (industrial schools and trade schools). As a result of the progress in the natural sciences and in technology, the pressure increased, especially in the last three decades of the nineteenth century, to expand the basic subjects on offer in schools. Schools called *Realgymnasium* were created or replaced the industrial schools. In the 1880s, the federation pushed through the recognition at the national level of the general qualification for university entrance and thereby of free access to universities with a recognized federal university entrance qualification (Vonlanthen et al. 1978). Besides the grammar schools, schools of commerce were established at the end of the nineteenth century. Offering full-time education with vocational qualifications, they positioned themselves between vocational further education colleges and the general education *Gymnasium*.

In order to supply the schools with qualified teachers, teacher training seminars were opened, starting in 1822, when the first teacher training seminar was created. Before then, teachers were being taught a minimum of qualifications in courses during the school holidays in the summer. In the 1830s, the teacher training seminar model asserted itself for the training of primary school teachers against a training on-the-job model and was established later as a training model for female teacher careers (kindergarten teachers, handicrafts, and home economic teachers). The training of *Volksschule* teachers remained at first reserved for men in many cantons. Only some cantons (Berne, Vaud) introduced women teacher seminars, already as early as the 1830s. Women were gradually permitted entry to the school service, initially in primary schools. In the nineteenth century, the education of women teachers was mainly supported by private institutions (by and large, denominational). From the 1870s, the municipalities became increasingly involved. Only in the last 30 years of the nineteenth century did the higher institutions of education largely open access to women; Swiss universities, especially the University of Zurich, were pioneers of women's higher education in Europe.

Next to the University of Basel, founded in a humanistic spirit in 1460, new universities were founded, or the old advanced education schools transformed into universities after the revolutionary upheavals of the beginning of the 1830s in Zurich (1833) and Berne (1834) (Botschaft HFKG 2009; Criblez 2008a). The French-speaking cantons followed the transformation of the old academies into universities in Geneva (1872), Lausanne (1890), and Neuchâtel (1909). The only Catholic university of Switzerland was founded in Fribourg in 1889. The universities are still cantonal institutions; since 1966, however, they receive federal funds (Lerch 1971).

Since the time of the foundation of the federal state in 1848, the federation has had the legal right to create a university and a polytechnic. Nevertheless, a national university was never accomplished. The federation was able, however, to open a federal polytechnic institute in Zurich in 1855 (today called the Swiss Federal Institute of Technology, *Eidgenössische Technische Hochschule* or ETH). The federation took over the *Ecole Polytechnique* in Lausanne as a second institute of technology. Over the years, these institutions developed into elite schools of higher education. A similar development was experienced by the School of Commerce (*Handelshochschule*) founded in 1898 in St. Gallen (today, University of St. Gallen).

The traditional organization of vocational education was dissolved with the suppression of the guilds at the beginning of the nineteenth century (Bauder and Osterwalder 2008; Späni 2008; Wettstein 1987). Although companies continued to train young people, there were no longer overriding standards – much in the spirit of the prevailing economic liberalism. It was only during the great economic depression of the 1870s and 1880s that measures were taken to revive vocational training. These measures were supported by the budding trade associations and by federate subsidies for vocational training since 1884 for vocational training in trade and industry, since 1891 for training in commercial professions, since 1893 for training in agricultural skills, and since 1895 for home economics. In 1908, the federation was assigned the right by constitutional amendment to issue regulations on vocational training in industry, trade, commerce, agriculture, and domestic science. This provision of the constitution laid down the basis for a national sphere of education in vocational training (even if limited along the divisions of the various vocational sectors) and provided the first piece of legislation on vocational education, passed by the federation in 1930. The dual system of vocational training (company and school) sought pragmatic proximity to employment and therefore was expected to take place mainly in everyday vocational practice and less within a school context – especially in further education, trades and crafts schools (Tabin 1989; Wettstein 1987; Wettstein et al. 1988). The further training schools of the various vocational sectors (today, vocational schools) were at first maintained by professional associations, sometimes also by municipalities. It was only in the second half of the twentieth century that the cantons gradually took over the maintenance of the vocational schools.

Higher technical vocational training began to be established at the end of the nineteenth century. In the course of the promotion of vocational education, at a time when the industrial museums were initiated as part of the world exhibitions, it became clear that there was a lack of training programs for middle-grade technicians for industry and the manual trades. The first schools for this purpose were opened in Winterthur (1874), Bienne (1890), Burgdorf (1892), Fribourg (1899), Geneva (1901), and Le Locle (1903), a nucleus of higher vocational educational facilities.

47.1.2 Key Phases of Reform and Innovation in Education in the Last 50 Years

The great lack of young professionals at the end of the 1950s – the negative impact of which made its mark on the economy – and the sociopolitical call for more equality of educational opportunities led in the 1960s and 1970s to an opening of higher education and to a strong expansion of the education system. The expansion was strengthened because of the baby boom of the war and postwar years, by classes becoming smaller, by longer stretches of time spent at school by individual pupils, and by the expansion of the educational institutions on offer. This expansion accompanied the school system through the economic crisis of the 1970s and beyond (Criblez 2001). In order to be able to cope with this development, the educational administration also began to grow (Criblez 2012).

The institutional effects of the expansion of the education sector were, among others, strongly increasing attendance rates at kindergarten; the transfer of the kindergartens from private into public responsibility; the attempt to integrate the schools into comprehensive schools; the introduction of the higher education entrance certificates in modern languages and economics; the introduction of new types of middle schools (diploma middle schools or *Diplommittelschule* and vocational middle schools); the distinctions made within vocational training between basic training (*Anlehre*), apprenticeship, and vocational middle school; the gradual shift of teacher training into the tertiary education sector; and the strong expansion of the universities and of the further education sector. However, projects to establish new universities failed.

The expansion of the education sector encouraged formal equality between the genders, yet without removing the discrimination of children and young people from the lower social strata and from families with a migrant background. As a whole, the education system expanded without essential reforms being appropriately realized, especially in the areas of the lower secondary level, grammar school, and teacher training. Only in the 1990s could the “reform logjam” be relieved, thanks to the introduction of the vocational and technical higher education qualifications (*Berufs- und Fachmaturität*) as leaving certificates, the creation of universities of applied sciences (*Fachhochschulen*), the reforms of grammar school and vocational education, and the redefinition of teacher training.

47.1.3 Political, Economic, and Cultural Conditions of the Current Education System

Switzerland saw itself since its constitution not as a nation united in culture, but as a “voluntary nation.” On a limited, densely populated space (end of 2011, nearly eight million inhabitants¹, of which 22.8 % are foreign nationals, around three-quarters of the population live in urban areas), Switzerland developed a multicultural self-image. Characterized by the coexistence of different language groups (proportion of the four national languages: German 65 %, French 23 %, Italian 8.5 %, and Romansh 0.6 %) and different denominations (around 39 % were Roman Catholics, 28 % reformed Protestants, 4.5 % Muslims, and 20 % without a declared denomination), the country had to develop mechanisms furthering tolerance, balance, consensus finding, and minority protection anchored in the rule of law. This small-scale educational federalism (with its 26 cantonal education systems) has always been justified by this cultural diversity. Generalized early foreign language instruction in one of the other national languages advocated in the 1970s and 1980s was considered not just a part of general education but also as the contribution of the education system to national understanding. This tradition, however, is now put into question in view of the economic necessity to promote English as the international *lingua franca*. This leads to demands that in the future, two foreign languages will be introduced at the primary school level, that is, a second national language and English in Year 2 and Year 5, respectively. Appropriate reforms are being undertaken in the various cantons. Since many municipalities today have to deal with a high proportion of students with a foreign mother tongue, various problems resulting from this demand are emerging.

Schools at the lower level of secondary education have always tried to meet the needs of the economy. At the point of transition from school to work, the “dual system” of vocational education is of major importance. However, various problems result from the quick changes in the world of work. Meanwhile, the primary employment sector sank to a level of less than 4 %; the remaining employees were spread across the manufacturing and service sectors in a ratio of 1:3. With the shift in jobs, especially toward the service sector, the need for qualifications also changes – a trend that has been strengthened over the last 20 years with the introduction of information technology. The related shortage of professionals in this field over the years has drawn many well-qualified workers from abroad. The government has responded to this by reforming vocational education law and introducing the *Berufsmatura*.

According to ILO, the unemployment rate of 4.2–8.4 % for 15–24 year olds (2012) is low in an international comparison; both rates increased after 2008 but have fallen in the meantime. There are an increasing number of options available to

¹Unless otherwise stated, all statistical data has been supplied by the *Bundesamt für Statistik* (Swiss Federal Office of Statistics); religious and language details come from random samples taken from the resident population aged 15 and over, as at July 2013 [<http://www.bfs.admin.ch/>].

young people leaving school: on the one hand, there are fewer young people looking for jobs; on the other, there are an increasing number of apprenticeships to choose from. This explains the decline in the demand for the transition solution – the so-called “bridging” year of Year 10.

Since the period of the expansion of the education sector in the 1960s, the social position of the teaching staff has never before been so secure. The attractiveness of the teaching profession, however, has sunk, more so that of positions in the *Volksschule* and less of positions in grammar and vocational schools. It has diminished with the increasing education level of the population, with the diminished authority of the school as an institution, and also with its ranking within the implicit hierarchy of education. Though in the middle of the twentieth century teacher training was still considered one of the most attractive courses of study, today, with more people studying at a university, many professions are more attractive than the teaching profession from the point of view of training, of the remuneration to be expected, and of the stress level (Criblez 2005). However, a political measure to make the teaching profession more appealing and new programs for career changers have led to an increase in the number of students in teacher training.

The teaching profession is, furthermore, characterized by other major changes. The proportion of women in all categories of teaching positions has increased. The degree of feminization, however, decreases from school level to school level: at the preprimary level, 99 % of teachers are women and at the primary level, 80 %. In the lower level of secondary education, there are equal numbers of male and female teachers; in general education schools at the upper level of secondary education, 42.7 % of teachers are women and in vocational schools, 34.8 % (BfS 2010, p. 28ss.). Moreover, the teaching profession is increasingly becoming a part-time profession. More and more teachers are only working on a part-time basis. Finally, there is a tendency for the teaching profession to become a transitional profession, as many teachers in the course of their careers are looking for a new professional challenge and for career opportunities outside of the school.

According to the federal civil law, parents have the right to educate their children (Plotke 2003, p. 17ss.). Furthermore, the federal constitution guarantees the neutrality of ideology within public schools and protects the religious freedom of the individual. The cantonal school law, therefore, defines the educational mission of the school as an addition to that of the parents. But since the educational mission of the school hardly makes sense without parental involvement, the participation of parents in school matters has been strengthened since the 1980s. The parents, organized in parents' councils and associations, can often delegate a representative to the school supervisory authority. Furthermore, parents are far more strongly involved in career decisions concerning their children than before.

The challenges put on schools in the area of family-school relations have mainly increased in two sectors: on the one hand, social problems in schools have intensified; municipalities have reacted to this by establishing school social work (Drilling 2009). In the past few years, a number of cantons have allowed the option of suspending for a few weeks those students whose behavior is unacceptable (Rohr 2010).

By doing so, schools are limiting the right to education for the students concerned (this right is not a constitutional right in Switzerland). On the other hand, school communities are called upon to organize schools to make them family and work friendly. Block times, lunch, and all-day structures at the school are measures that could meet this demand (Larcher Klee and Grubenmann 2008). This development is further advanced in Italian- and French-speaking Switzerland than in the German-speaking part.

47.2 Fundamentals, Organization, and Governance of the Education System

47.2.1 General Principles, Current Educational Policy, and Goals of the Education System

Three features fundamentally characterize the Swiss education system: firstly, it is part of a modern rule of law; secondly, educational policy is strongly marked by the principles of direct democracy; and, thirdly, the system is obliged to follow a course of educational federalism. The most important principles of educational policy are formulated in constitutions and legislation (Plotke 1994). Maintaining bodies are obliged to follow these principles, and educational administration acts on the basis of defined procedures. The legislature (the parliament) and the executive (the government) in the cantons are both elected by the population and are therefore democratically legitimated. Amendments to the constitution can only be passed by referendum at the federal level and approval by the majority of the cantons. Acts passed by the parliament are generally subject to a facultative referendum at both the federal and cantonal level. The cantonal governments prescribe the curricula and publish decrees. The democratic control of power in education is guaranteed in two ways (Criblez 1999): firstly, by the elections to the parliaments, to the governments (the upper house, *Bundesrat*, is however elected by the national parliament), and in the municipalities even to the school supervisory authorities and secondly, through the possibility of political intervention in education matters using direct democratic means. These direct democratic options sometimes come into conflict with increased efforts to boost efficiency and harmonize affairs between cantons.

The fact that the cantons are responsible for most regulations in education is attributable to the cultural sovereignty prevalent since the nineteenth century. The small-scale educational federalism was originally justified on denominational and language grounds. The former has been largely modified by the secularization of society and by increasing mobility. Moreover, educational federalism is being questioned by economic and social developments that increasingly modify canton borders and national borders, too. The international recognition of degree and the Bologna reform in higher education are only two examples of this. The cantons have reacted to these developments by increasing their efforts at harmonization and are legitimated in this by the “educational constitution” passed in 2006. However, these efforts have met with resistance, particularly from conservative circles.

Swiss educational policy is borne by two fundamental convictions, which, among other things, were somewhat shocked by the results of the Programme for International Student Assessment (PISA) studies. For the principle of education for all, there is the tradition of the 9-year *Volksschule*, set up in the 1970s. Extending school downwards to a total of 11 years of compulsory education by integrating the 2-year kindergarten is currently being discussed; however, it is a controversial notion: an extension upwards has hardly been considered to date. However, the federation and the cantons have set the target of achieving a completion rate at the upper level of secondary education of at least 95 % of a cohort by 2015. The second fundamental conviction is that of the principle of merit, in other words, that access to higher education is only possible through school achievement. Comparative studies of school achievement have now shown that the Swiss education system considerably disadvantages children and young people from migrant and/or poorly educated families. The PISA measures undertaken by the Swiss Conference of Education Directors (*Schweizerische Konferenz der kantonalen Erziehungsdirektoren*, EDK) in the last 10 years have strongly targeted early childhood care and education and help with the language.

47.2.2 Basic Legal Principles of the Education System

The cantons now have, as they have had before, a central role to play in the framework of federalism in education. All areas, which are not explicitly defined as falling under the remit of the federation, are regulated by the cantons. Since the new constitution came into force in 2000, the federation has the responsibility for the whole of the vocational training sector, which also comprises the universities of applied sciences (*Fachhochschulen*). Next to this, the federation is running two technical colleges, is active in the support of higher education and science, and has laid down some principles for the *Volksschule* in the constitution (Art. 62). Since the “educational constitution” was revised in 2006, the federation has subsidiary competence in harmonizing defined areas of the *Volksschule* and higher education and can define new principles for further education.

The cantons autonomously regulate the preschool and the *Volksschule* sectors as well as the general education middle schools and the cantonal universities, they also execute the federal law in the vocational training sector, and they bear the major financial burden of the education system and are the maintaining bodies of upper secondary schools and of the higher education sector. The municipalities are generally school-maintaining bodies in the preschool and *Volksschule* sector, and they also finance these schools, but they receive funds for this purpose from the cantons. In recent years, the school communities have been granted greater autonomy in most of the cantons. At the same time, the internationalization of educational policy is driving toward stronger harmonization among the cantons.

The cantons have established the Swiss Conference of Education Directors (*Schweizerische Konferenz der kantonalen Erziehungsdirektoren*, EDK) (Badertscher 1997; EDK 1985) as a body that will manage cooperative federalism.

By the use of concordats, agreements, and recommendations, this conference is trying to harmonize and, at the same time, to safeguard the autonomy of the cantons in the education sector. In 1970, it issued the concordat on school coordination (Manz 2011). This document regulates the compulsory school commencement age, the 9-year mandatory school attendance, the time spent at school until the higher education qualification certificate (12–13 years), and the start of the academic year in late summer. In harmony with the new educational constitution of 2006, the EDK passed an inter-cantonal agreement on the harmonization of the obligatory school (the Harnos concordat) (EDK 2011). This is to be the basis for the further harmonization of aims and structure in the *Volksschule*. Among other things, the concordat envisages bringing forward the age children start school to 4 and thus extends compulsory schooling to two kindergarten years, unifying levels of school, uniform curricula for the language regions, and the introduction of educational standards. In some cantons, this agreement has not passed through a referendum. Those cantons that have passed the agreement have already started to adapt their school legislation.

47.2.3 Managing the Education System

The most important institutions of educational administration in the federally organized education system are the cantonal education departments (*Bildungsdirektionen*). The elected directors of the government (*Regierungsräte*) share responsibilities for the cantonal educational administration. At the federal level, the former federal office for vocational training and technology and the office of the secretary of state for education, research, and innovation were merged in the newly organized federal department for science, education, and research. On the one hand, the Staatssekretariat für Bildung, Forschung und Innovation (SBFI) is responsible for vocational education at the upper level of secondary education and in higher education and is thus responsible for the universities of applied sciences; on the other hand, it is accountable for grammar school, for universities, and for science and research. In many policy issues – especially in setting up a national system of educational monitoring (compiling regular national reports on education, SKBF 2010) – the federal administration and the EDK work together.

Various cantons today still have educational councils or instruction councils. They have had the function of an “education government” and embodied the idea of a voice of the educated public, able to execute policy in education at least to a certain degree independently from the parliament, government, and administration (Brändli et al. 1998). At the local level, the schools are being generally looked after by a lay authority, which is described as a school commission (*Schulkommission*) or a school council (*Schulrat*). Since the 1990s, the institutions of higher education have increasingly been coming under the strategic command of a higher educational council. While the school commissions at the local level are mostly responsible for the organizational and administrative needs of the schools, the professional school inspection fulfills the role of a supervisory body of the cantons

for subject-related questions and issues related to methods (Rhyn 1998). With schools being granted greater autonomy, the roles of the school commissions, whose tasks in the field of personnel and organization are being increasingly taken over by head teachers, as well as the role of the school inspectorate are being redefined.

The hierarchies within schools were traditionally very flat prior to the introduction of head teachers. In each of the cantonal reform processes over the last 15 years, responsibilities have been redistributed – partly in line with the autonomy granted to individual schools – between the new school administration, the lay authorities, and the professional school supervisory bodies. In many cantons, however, staff appointments are still the responsibility of the lay supervisory authorities – the school commissions. In larger municipalities and towns, the school commissions and the school administration were supported by school secretariats.

As a whole, in the Swiss education system, a balance between competence delegation, accountability, and control had developed over a long period of time (Criblez 1999). With the changes brought about by the 1990s, this balance has been disturbed in many respects. This is only gradually being reestablished under new circumstances. One of the main tasks of the future will be to build up functioning quality assurance systems without becoming bureaucratic.

47.2.4 Funding Education and Its Institutions

The federation, the canton, and municipalities spent 29.7 billion Swiss francs on education in 2009, roughly 13 billion more than in 1990 (all information, BfS 2012a). The proportion of spending on education as part of the overall public budget is 16 %; it has been declining for some time. The education budget in 2009 was 5.4 % of the GDP. Of this, 3.5 % was allocated to preschools, 43.4 % to compulsory schooling, 5.8 % to special schools, 12.1 % to vocational education, and 7.8 % to general education schools at the upper level of secondary education. In the tertiary sector, universities take the biggest piece of the pie with 24.4 %. Only 0.7 % is allocated to higher vocational education because most of this is financed by the participants themselves. The federation bears 10.1 % of the educational expenditure, while municipalities account for 32.5 %. The largest proportion of 57.4 % is financed by the cantons. The municipalities are mainly involved in the financing of the preschool and *Volksschule* sectors. The federation finances around 45 % of the higher education sector and vocational training. The largest proportion of costs is attributable to staffing (51.6 % for teachers, 14.5 % for ancillary staff); equipment accounts for 14.9 % of costs, while 7.7 % of costs are attributable to investments. Per capita costs of education vary from canton to canton and from level to level.

Scholarships are wholly in the hands of the cantons. However, the federation does offer subsidies. Since the restructuring of the financial equalization schemes and the distribution of responsibilities between the federation and the cantons in 2004, the federation only subsidizes the tertiary sector. In 2011, around

48,000 people received scholarships in Switzerland, averaging CHF 5,350 (all information, BfS 2012b). Since 2009, the real value of cantonal educational assistance (scholarships and loans) has been rising, after it had been in decline since 1995 despite the rising number of students. Around 8 % of all students in nonobligatory education received educational assistance. Cantonal scholarship policy varies enormously – in terms of the number of grants awarded, the average grant, and the guidelines for granting scholarships. In 2009, therefore, the EDK passed the inter-cantonal agreement to harmonize educational contributions which came into force in 2013 once ten cantons had signed up to it. The federation is currently revising the law on educational contributions, and a referendum on harmonizing and improving the system of scholarships is pending.

47.2.5 Relationship Between the Public and Private Sector

Private schools have always played a limited role in the Swiss school system (Plotke 2003, pp. 663ss.). Public education throughout the country, with the exception of tertiary educational facilities and further education, is free of charge, whereas private education is subject to fees – even if these fees are based on parental income. The proportion of private students (in subsidized and nonsubsidized schools) fluctuates according to the economic climate. In 2009/2010 (BfS 2011a, p. 19ss.), it was negligible in compulsory school ages (preschool, 3.9 %; primary school, 3.3 %; lower level of secondary education, 5.7 %) while slightly higher at the upper level of secondary education (*Gymnasium*, 11.2 %; technical secondary school, 3.3 %; professional colleges, 7.5 %) and significantly higher in the tertiary sector with 17.8 %. The latter is mainly attributable to higher vocational education (65.9 %) which is largely carried out by private professional associations. In contrast, only 13.2 % of students attend private universities of applied sciences. The universities are fully maintained by public funds. Only a small proportion of private-maintaining bodies of schools are publicly subsidized. This does not apply to higher vocational education where the number of students in subsidized and nonsubsidized schools is equally balanced and the situation is very much different in schools with special curricula (small classes, special schools): here, 31.5 % of students attend a private facility, and the maintaining body is nearly always subsidized. In a variety of cantons in the last 30 years, politics has intervened in favor of increasing subsidies to private schools. These advances have been rejected – in part by referendums – as has the introduction of the free choice of school.

47.2.6 Quality Development and Support for Educational Facilities

Quality assurance and development are generally the responsibility of the individual educational facilities/schools. The distribution of tasks between school administration and supervisory authority varies between the cantons. Schools

elaborate missions and carry out internal evaluations. In most cantons, specialist positions for external school evaluators have been created in the last 10 years (Quesel et al. 2011). Within the scope of new public management measures, some cantons have introduced performance-related employee reviews for the teaching staff; most cantons however make use of encouraging qualification systems.

At the higher education level, the Swiss Center of Accreditation and Quality Assurance in Higher Education (OAQ) has been given the task of securing and promoting the quality of teaching and research in higher education. The new Federal Act on Funding and Coordination of the Higher Education Sector (HFKG 2011) envisages an obligatory institutional accreditation (universities) and a voluntary accreditation of programs (courses).

At the macro-level of education, two main measures have been introduced in the last few years to secure quality of the system and, as a part of an evidence-based policy of education, to generate the required data to develop the education system further. On the one hand, the EDK defined educational standards in 2011, in the sense of basic skills to be learned (Criblez et al. 2009, p. 88ss.), which are to be piloted nationwide from 2016. On the other hand, the federation and cantons have been publishing national education reports every 4 years since 2006 to serve the monitoring process. In the course of the last few years, various cantons and regions have also introduced periodic educational reporting.

Support services available to schools and the teaching staff alike are an important element in quality assurance. The cantons provide various counseling services for children, for young people, for parents, and sometimes also for adults and for schools. The school psychology services, or the child guidance centers, deal with school problems, carry out tests, and provide counseling in cases of uncertainty (as to whether enroll in a school or whether a pupil should be referred to special classes). In cooperation with the schools, they order special instruction in the field of speech therapy, dyslexia, and psychomotor disorders. This instruction is provided by specialized teachers. The number of children who receive such special tuition has greatly increased.

47.3 Overview of the Structure of the Education System

The Swiss school system has seen a fundamental transformation since the 1990s. The traditional hierarchically structured system, where educational careers started from the broad base of the *Volksschule* and led via the grammar schools to the narrow top of the university, has been increasingly losing its pyramid shape in favor of a broader top since the opening of higher education. Furthermore, since the introduction of the vocational leaving certificate and the qualification for specialized higher education, offering admission to colleges, a system with two tops (universities and universities of applied sciences), is beginning to emerge.

47.3.1 Preschool

On the one hand, the preschool sector today covers an area shaped by socio-pedagogic traditions and, on the other, an area that is increasingly designed as part of the school system. In the last decades of the nineteenth century, day-care provision for children of working mothers set up in the 1820s developed in two directions: one of the institutions which took care of small children developed into kindergartens based on the ideas of Fröbel; the other part became crèches, which take care for infants. For both institutions, the exclusive function of care prevailed in the German-speaking part of Switzerland, whereas in the Italian- and French-speaking parts of Switzerland, the kindergartens (*scuola dell'infanzia, école enfantine*) also assumed educational functions. Since the discussion about early support for disadvantaged children in the 1960s and 1970s (in terms of compensatory education), the kindergartens began to move closer to school education, and, step-by-step, the public authorities took over the financing and governance of the kindergartens.

As a rule, kindergarten lasts 2 years. In the canton of Ticino, municipalities have to provide kindergarten that covers up to 3 years. In line with the Harnos concordat, cantons have tended in the last few years to make attendance at kindergarten, which used to be voluntary, obligatory for a 2-year period. This regulation is expected to spread further in the coming years. The average time spent at kindergarten has risen steadily in recent years. The starting age varies by canton from 3 years (Ticino) to 5 years and 4 months. As part of the harmonization process, the aim is to start the 2-year obligatory part of kindergarten when children turn 4 years (cutoff date, 31 July).

Four further trends can be observed in the preschool sector. Firstly, the school structures are supposed to be redefined at the beginning of the school career so that either the last kindergarten year and the two first primary school years or both kindergarten years and the two first primary school years would be joined together in one basic level. The introduction of the basic level has met with obstacles, especially because the new concept is more expensive for the maintaining bodies than the traditional separation between kindergarten and the primary school. Both concepts assume that the classes are heterogeneous in age and offer the possibility to move through school at this level at different speeds. The new curricula (*plan d'études romand* for the cantons in western Switzerland, *Lehrplan 21* for German-speaking Switzerland) assume there will be three cycles: kindergarten and Years 1–2 of primary school, Years 3–6, and Years 7–9. Secondly, both these ideas involve the bringing forward of the compulsory school commencement age because two kindergarten years are mandatory – regardless of how the levels will be defined. Thirdly, many cantons have introduced cantonal curricula for the kindergartens which go against regulations prohibiting the teaching of reading, writing, and arithmetic in kindergartens. The new regional curricula also apply to the kindergartens. Finally, a cantonalization process is linked with all these changes. Although the municipalities remain the maintaining bodies of the kindergartens, the cantons increasingly reserve the right to regulate; they define the core curricula and targets and take part in the financing of (personnel) costs.

47.3.2 Primary Education

In terms of structure, the primary school is the level of schooling that is least affected by reforms. It currently lasts 4 or 5 years but, as part of the ongoing harmonization process, will probably last 6 years in all cantons (expected for Ticino, 5 years). At the primary level, teachers employed full-time teaching between 27 and 33 lessons (lower secondary level, 22–31 lessons). Instruction time per week fills 22 lessons at school commencement and at the end of the lower secondary level, around 35 lessons. The lessons or periods prescribed by the curriculum strongly vary from canton to canton: between the minimum school-time and the maximum, there is more than a whole school year. The two new regional curricula are therefore targeting a harmonization of the timetable.

Subjects taught and the content are fixed in cantonal curricula, which, as a rule, are passed by the government. Great differences between the cantons are found in the definition of school subjects. Generally, children are taught in their mother tongue, mathematics, sciences, music/singing, and physical education, as well as drawing and crafts (textile and non-textile). The first foreign language is generally taught from Year 5. Some cantons are now introducing English at the primary school level from Year 3. Sometimes, integrated subjects such as nature studies have been implemented. In both main language regions, subjects, timetables, and syllabi will be strongly harmonized in the future. In French-speaking Switzerland, the common *plan d'études romand* is currently being implemented; in German-speaking Switzerland, the *Lehrplan 21* is intended to be in place by 2014. Teaching materials are provided by the cantons or from private publishers. Generally, cantonal commissions decide which textbooks are mandatory or will be permitted.

47.3.3 Lower Secondary Education

As far as schooltime, subjects taught at school, curricula, and textbooks are concerned, the most important points mentioned in the section on the primary school above also apply to the lower secondary level. In the future, the lower secondary level will have three school years (in Ticino, 4 years). Traditionally, the lower secondary level has three or more tracks and is divided at least into a *Realschule*, a secondary, and a grammar school section. The transition from the primary school to the lower level of secondary education is based on a formal procedure (certificates and recommendations from the primary school). Since the 1970s, various cantons have developed cooperative or integrated school models at this level. As a rule, the main subjects are the mother tongue, mathematics, and the first foreign language. In the cantons of French- and Italian-speaking Switzerland, the structural integration process in the lower secondary level has progressed further than in German-speaking Switzerland. In some cantons, school communities can freely choose between various models of schools. The proportion of pupils attending a school type with only basic requirements has been sinking permanently since the education expansion phase.

Following the lower secondary level, pupils transfer to a general education middle school or to vocational training. The proportion of those who attend a tenth school year as an in-between solution strongly increased in the 1990s because of the lack of apprenticeship positions, but is now beginning to fall again. Besides Year 10, there are other bridging options intended to facilitate entry to the world of work. In recent years, various cantons have redesigned projects for the Year 9 with the aim of better preparing young people for work.

47.3.4 Special-Needs Schools/Classes

Small or special classes are specialized classes, which differ from the normal classroom instruction, but are part of the *Volksschule*. They are offered for pupils who, for various reasons, cannot follow regular instruction or can only follow instruction with great difficulty, an optimum learning environment. At the beginning of the twentieth century, the principle followed the belief that the best possible support for these children was in special, not regular, classes. Since the middle of the 1990s, efforts have been made to dissolve these small and special classes and to integrate many pupils into regular classes and to support instruction by the staff with special training in remedial education.

The cantons have organized the small and special classes in a variety of ways. There are great differences in the cantons and the regions in dealing with poorly performing pupils: whereas some cantons tend to send these pupils to small or special classes, others use the repetition of a year more often as an instrument. The proportion of pupils with special needs (in special classes or special schools) rose in 2005/2006 to around 6 % and has been falling since then in line with the efforts to integrate them. The rise was mainly attributable to the strong increase of immigrant pupils in special classes and special schools (SKBF 2010, p. 86). The variation between the cantons is enormous. In these classes, children who speak a foreign language as their mother tongue are heavily overrepresented. Besides the argument that special support in separate classes is no longer the most advanced way of dealing with this issue and, as regards school performance, is only partly legitimized, the increasing number of pupils in small and special classes and related costs has led to a wide acceptance of the integration principle. Efforts toward integration have been strengthened in recent years not least because of the PISA results.

In the special school sector, distinction is made according to the nature of the disability between institutions for the physically disabled, for those with sensory difficulties, for the mentally disabled, for children with complex disabilities, for children with behavioral disorders, and for autistic children. The aim of special schooling is to remedy or to lessen the disability and to enable future inclusion into vocational life (Plotke 2003, p. 130).

Special schools are mostly a type of school for themselves and are often residential. Until 2008, special-needs schools were regulated by the federal legislation as part of insurance regulations for the disabled and were subsidized by the federation. As a consequence of the restructuring of financial equalization

scheme and the distribution of responsibilities between the federation and the cantons in line with the changes to the constitution in 2004, educational, legal, and financial responsibility for special education of children and young people was fully transferred to the cantons in 2008. To coordinate this area of education, the EDK passed the inter-cantonal agreement on cooperation in special education, which came into force in 2011.

47.3.5 Upper Secondary Education

The secondary level is divided into three basic sectors: grammar schools, specialized middle schools (*Fachmittelschulen*), and vocational education with vocational university entrance qualification (*Berufsmatura*). All these sectors underwent fundamental reform in the 1990s. Today, more than 90 % of young people successfully complete an upper secondary education. The educational policy of the federation and the cantons is to increase this to 95 % by 2015.

During the expansion period of the education sector of the 1960s and 1970s, the number of grammar schools more than doubled in a short space of time, thanks to decentralization; the matriculation rate strongly increased. Although new types of *matura* were recognized in 1972, significant structural reforms did not happen. A radical reform of the grammar school was carried out in the 1990s (Meylan 1996). *Matura* certificates that had existed until then were abolished. A unitary higher education entrance qualification was introduced together with basic subjects, emphasis subjects, and complementary subjects. The various compulsory and selective subjects comprise languages, 30–40 %; mathematics and the natural sciences, 25–35 %; the humanities and social sciences, 10–20 %; art, 5–10 %; and emphasis and optional subjects as well as a *matura* paper 15–25 %. The cantons and the individual schools have enjoyed considerable freedom within these specifications in the shaping of the education programs, which, however, must be accredited by the federal *matura* recognition commission.

In most cantons, education until the leaving certificate lasts 12 years, in individual cantons, 13 years. The grammar school program has to stretch over at least 4 years. Besides the “interrupted” channel, changing from the lower secondary school to the grammar school after Year 8 or 9, many cantons also have a long-term grammar school that begins in Year 7. Transfer to a grammar school is made in a formal procedure, where the feeder schools are involved with recommendations and average grades. Some cantons carry out selection through an entrance exam.

The proportion of grammar school pupils who achieve the higher education qualification has nearly doubled, to 20 %, since 1980. Since 1993, it has been higher for girls than for boys. However, the rates strongly differ from canton to canton. While in some cantons nearly every third young person passes the *matura* examination, in other cantons it is as low as every seventh or eighth pupil. Nearly half of the students transfer to a university-type higher education immediately after receiving their higher education entrance qualification. The transfer rate of men,

which is up to 80 %, has increased; the transfer rate of women is 70 %. Accordingly, grammar schools do not only prepare young people for university degree courses.

To date, the *matura* certificate has been seen as a general higher education entrance qualification, which in the meantime has been partially restricted: for medical school, at present, there is a numerus clausus, and admission to most of the technical colleges is only possible after a 1-year internship in an enterprise that operates in a field related to the proposed subject. In addition, individual institutions of higher education have defined subject-related entrance examinations (especially music and art schools).

Former general continuing education schools and schools for girls established at the beginning of the 1970s were transformed into “diploma middle schools” (*Diplommittelschule*, DMS) (Criblez 2001). They were expected to prepare for advanced vocational training in educational, social, and paramedical fields. When, in the mid-1990s, the universities of applied sciences (*Fachhochschulen*) were established, the DMS hit a crisis because their leaving certificates did not enable pupils to matriculate. This led to the transformation of the DMS into a *specialized middle school*. Since 2004, the specialized middle school diploma is obtained after a 3-year course. This school imparts a deepened general education and prepares for vocational training in the fields of health, social work, education, communication and information, design and art, and music and theater, as well as applied psychology. Besides a general education part, the curriculum contains vocation-related options. With a 1-year internship or a supplementary general education year, it is possible to obtain a specialized higher education entrance qualification, which serves as an admission qualification for the corresponding university of applied sciences. Around three-quarters of specialized middle school graduates are young women (BfS 2011a).

Roughly two-thirds of all young people finish *basic vocational training* in one of the 250 professions (SBFI 2013, p. 15). This is regulated on an integrated basis by the federation since the new federal constitution came into force in 2000. The schools are maintained either by the cantons or by commercial organizations. The cantons supervise basic vocational education in enterprises and schools. After completing the mandatory schooling, young people can start a basic vocational instruction with an apprenticeship contract in a company. Basic vocational education lasts 2, 3, or 4 years. It is acquired at three distinct places: firstly, in the business itself, in the association of teaching enterprises, in teaching workshops, or in the commercial middle schools; secondly, in specialized vocational schools; and thirdly, in external courses.

Following a basic 2-year instruction, young people receive a federal vocational qualification certificate. 3- to 4-year training courses are rounded off by an apprenticeship examination and lead to the federal certificate of professional competence. This can be extended by complementary general education to a vocational *matura*, which can run parallel to basic vocational training at the end of it. The vocational *matura* is the admission requirement for universities of applied sciences. Within a few years after its introduction in the mid-1990s, nearly 14 % of pupils take the vocational *matura* – the rate for males is

slightly higher than for females. The vocational *matura* can be taken in one of six tracks – technical, commercial, design, industrial, natural science based, and health/social work.

47.3.6 Tertiary Education

The tertiary education sector comprises various fields: the system of higher education, which itself comprises universities, universities of applied sciences, teacher-training colleges, and various offers of higher vocational training.

The *universities* are under the responsibility of the cantons. The federation is the maintaining body of the two technical universities (Eidgenössische Technische Hochschule – ETH) in Lausanne and Zurich. Students with a higher education entrance qualification can freely choose the place and the institution where they want to study, with the exception of medical studies, which in German-speaking Switzerland, are bound by a *numerus clausus*. Courses of study have been redesigned in the last 10 years along the lines of the bachelor's/master's degrees (BA at least 3 years, MA at least 5 years). In particular for the humanities and social sciences, this meant a further school-like teaching during the program. In many courses, the taught phase has become more selective in recent years.

Despite the creation of universities of applied sciences, the number of universities continues to grow: in 2010/2011, 131,524 students were registered at universities, 53 % more than 20 years ago (BfS 2011b, p. 10; all other statistics: BfS 2012c). More women complete their master's degree than men (2011, 50.3 %); however, men are in the majority of PhD graduates (2011, 54.4 %). The proportion of women varies according to subject: women dominate in the social sciences and humanities, medicine, law, and even agriculture and forestry; in the other faculties, there are more men than women.

The new University of Applied Sciences Act was created as a new type of higher education in 1995. *Universities of applied sciences and universities* are “equal but different” (Botschaft FHSG 1994, p. 16). Universities of applied sciences are strongly oriented toward the vocational world and conduct applied research and development. Many advanced specialized schools have been integrated into the universities of applied sciences, and, in those cases, the courses of study were reformed correspondingly. The universities of applied sciences are under the general responsibility of the federation. Seven public institutions and two privately maintained facilities have been accredited. With the exception of one university of applied sciences focusing on tourism/hospitality, all universities of applied sciences are multi-faculty. As a rule, the maintaining bodies belong to the cantons, either to a number of cantons simultaneously or individual cantons. In the last 10 years, bachelor's degrees, and in some cases master's degrees, have been introduced in universities of applied sciences. With the transfer of cantonal regulation competency to the federation, the faculties of arts, music, and theater, social work, health, applied psychology, and applied linguistics are being integrated into the university system of applied education of the federation. In northwest Switzerland, in Zurich

and in Ticino, teacher training (administered by the cantons) is part of the respective university of applied sciences; in all other cantons, there are special colleges of education (exception, Geneva).

The number of students in the universities of applied sciences has increased strongly in recent years: in 2010/2011, 75,035 students were registered at universities, 200 % more than 10 years ago (BfS 2011c, p. 10; all other statistics: BfS 2012d). For some years now, more women than men have been graduating from universities of applied sciences (2011; BA, 54.7 %; MA, 54.3 %). However, there is a huge difference between faculties: women dominate in applied linguistics (73.9 %), applied psychology (77.8 %), health (90.9 %), teaching (71.3 %), and social work (71.4); men are more prevalent in architecture and construction (69.9 %), chemistry and life sciences (60.4 %), technology and IT (96.1 %), and business studies (61.6 %).

Competence for the regulation of teacher training lies, with the exception of teachers in vocational schools, with the cantons. Since the mid-1990s, teacher training has been reorganized so as to be offered at *colleges of education* or at universities of applied sciences (in Geneva, at a university). The subject-related training of the teaching staff of the lower and upper secondary levels is partly carried out in universities and universities of applied sciences. There are special programs for the teaching staff of the preprimary, primary, and lower secondary levels as well as for the teaching staff for schools preparing for higher education entrance certificates and for teachers of remedial education. The training period stretches over at least 3 years, for the teaching staff of the lower and upper secondary level, over 4–5 years. The degree courses are accredited by EDK and recognized through Switzerland. In most of the cantons, in-service training for teachers has been integrated into colleges of education. Placing the whole process of teacher training in the higher education sector connected research and development.

The requirement for *higher vocational training*, where the purpose is to qualify for a more challenging and responsible position, is a qualification in basic vocational training. The *vocational examination* and the *higher vocational examination* attest to the completion of further education in relevant branches of trade and industry and presuppose a corresponding vocational practice and corresponding subject-related knowledge and skills. The vocational examination ascertains whether the candidate possesses the necessary skills to fill a leadership position or fulfill a demanding vocational function. Once the examination has been passed, a federal subject-related certificate is issued. The higher vocational examination ascertains whether the applicant is capable of independently running an industrial operation and whether the applicant satisfies more demanding vocational requirements. Passing the examination entitles the student to bear the protected title “master of the trade.” The cantons and the trade associations offer courses preparing for this examination, which run parallel to work. The relevant organizations of industries and trades regulate the admission requirements, course contents, qualification procedures, certification, and titles. These provisions are approved by the Federal Act on Vocational Training 2002 (*Bundesgesetz über die*

Berufsbildung). For both of these examinations, the number of students attaining this level has strongly increased since the education reforms of the 1990s.

Since the 1980s, a whole system of higher specialized schools has been developed in addition to the traditional technical schools. Shorter and less demanding or less research-focused courses have not been integrated into universities of applied sciences since they were created. As a full-time program, the training lasts for at least 2 years; as a continuing training parallel to work, it lasts at least 3 years. Such courses require students to document relevant vocational experience. The federation issues minimum rules and regulations and accredits the courses of study. The cantons supervise them (Federal Act on Vocational Training 2002, Article 26ss.).

47.3.7 Continuing Education

Continuing education comprises two main sectors: continuing professional training and continuing general education (Schläfli and Gonon 1999). Basically a matter of private initiative, the federation and the cantons have established subsidy systems for individual areas of continuing education. The new educational constitution gives the federation new responsibilities in this field, and a federal law of continuing education will be read before the parliament shortly (Botschaft BG Weiterbildung 2013; EVD 2009). The aim of the new law is “to strengthen privately organized and individually accountable continuing education. State intervention shall not be the focus” (Botschaft BG Weiterbildung 2013, p. 3731). When it comes to continuing education, the federation is working on the basis of five principles: the accountability of the individual and private person, the systematic assurance of quality, the eligibility for formal education qualifications, the promotion of equal opportunities (in particular by fostering second chance education and taking measures to counter illiteracy), and making continuing education competitive.

In 2011, 77 % of the 25–64 year olds have been involved in continuing education activities in the last 12 months (all information: BfS 2013, p. 4ss.). Men and women are involved in equal number; but these numbers fall considerably for people over the age of 55. People in employment continue their education more than the unemployed or inactive. Well-educated people seek more training opportunities than those without any post-obligatory training. Persons from French- and Italian-speaking Switzerland attended courses remarkably less frequently than persons from German-speaking Switzerland.

47.4 Developments in the Current School System

The far-reaching reforms introduced in the 1990s in Switzerland have been partly concluded; in various sectors, consolidation is now necessary, in others corrections, to deal with unintended consequences. Still in other sectors, there is a need for further reform. In addition to structural reforms, there are three other areas that are

gaining in importance: governance, quality, and issues of content. All three areas are interconnected in many ways with structural reforms.

First, with respect to the *governance of the education system* (Hutmacher 1998), the basic question arising explores the problems that will have to be solved in the future and at what political level: in view of growing internationalization, the educational policy of horizontal federalism – as practiced in Switzerland over the last 20 years with a myriad of new, inter-cantonal agreements – is still likely to be effective and efficient enough in the future. The dilemma between educational federalism and national/international competence may well continue to be a major challenge for the future educational policy of Switzerland, both at the upper level of secondary education and in higher education. The distribution of tasks between the federation, the EDK (as the collective voice of the cantons), and the individual cantons themselves and also between the cantons, the municipalities, and the schools (Criblez 2008b) will also continue to concern educational policy.

Although schools have gained autonomy in the preschool and *Volksschule* sectors, at the same time administration is tying up more and more resources that are necessary for the educational management of schools. A meaningful, new distribution of tasks between school management and the local and cantonal school supervisory bodies is only gradually appearing. The new educational constitution drawn up in 2006 formulated aims that are particularly aligned to the harmonization and a better national governance of the *Volksschule* sector. Among other things, the cantons have strengthened their collaboration within the scope of the EDK and thanks to the Harnos concordat that has undertaken steps to implement these harmonization aims. However, resistance to the concordat has grown in some cantons. Given the apparent chasms between the cantons, two significant structural issues – the structure of initial schooling and the lower level of secondary education – were not regulated in the Harnos concordat.

The new educational constitution of 2006 also called for tighter national coordination in higher education. The first step toward this was triggered by the Federal Act on Funding and Coordination of the Higher Education Sector (HFKG) of 2011. The implementation process of this act is in preparation. Following on from the HFKG, the EDK passed a corresponding higher education concordat in 2013 that regulates the collaboration between the cantons and between the cantons and the federation. Given the justified demands for autonomy from the universities and the maintaining cantons on the one hand and the need for national coordination on the other, targeted, viable solutions will not be easy to find. The new bodies born out of this cooperation first need to become operational before proving their functional capabilities.

The second area of key significance is *quality assurance* at all levels of the system. Switzerland was subject to an inspection of its education system by the OECD for the first time at the end of the 1980s and had a separate evaluation of its higher education sector and innovations in vocational education (EDK 1990; OECD 2003; OECD/CERI 2008). It also participates in the PISA international school performance surveys. This external, comparative view of the education system of Switzerland has directed the attention to quality issues at the system

level, and various reforms have been introduced. As a result, the federation and the cantons have set up a national system for monitoring education (SKBF 2010), and in the coming years, the EDK will be systematically assessing the degree to which educational standards defined for compulsory education have been met. The cantons have strengthened quality assurance in particular by introducing external school evaluation. However, the results – including those of the PISA studies – have highlighted considerable concerns in education. It is therefore likely that the quality assurance issue will significantly gain importance.

Teachers at all levels of school and in continuing education will play a key role, and measures to increase the appeal of the profession will become necessary. In addition, the further “individualization” of educational careers and the related permeability of the education system at all levels will be important. Finally, the quality discussion alone is likely to shift the introduction of regional curricula to the level of content. The implementation of new curricula will be a significant educational task for the cantons in the coming years. This will also involve the question of teaching materials. The fact that teaching materials are an important instrument in the targeted management of schools has been recognized, at least in part. This will also make the issue of material policy an important one in the coming years.

47.5 New Developments

Many structural reforms which were initiated in the 1990s have not yet been concluded. Structural innovations instigated thus far need to be consolidated and further reforms undertaken in certain other areas. The most important of these are:

- New regulations governing the type of school at entrance age, bringing forward the age at which children start school to 4 years, incorporating kindergartens into the education system
- Nationwide provision of day care for children outside the family and ensuring that the organization of such is better coordinated with the schools
- Structural reform and harmonization of the lower secondary level
- Avoiding emerging disparities between cantons in the special education sector
- The continuing development of the dual system of vocational education and the grammar school at the upper level of secondary education that will allow for greater transfer between the two and overcome in part at least the rigid delineation of general education and vocational education programs
- Further consolidating tiered higher education programs and managing the anticipated – and, in view of the shortage of skilled professionals, meaningful – continuing growth in the tertiary sector
- Improvements to the position of scholarships and the harmonization of scholarship procedures
- Improving the appeal of the teaching profession
- Improving continuing education, in particular for disadvantaged groups or groups who normally shun continuing education.

In addition, there are some old problems that are posed in new circumstances: the PISA surveys have shown that the efforts made toward the integration of children and young people whose mother tongue is not the language of instruction will have to be increased. Also, the proportion of male to female pupils on training courses is becoming skewed again at the upper secondary level and in the tertiary education sector and requires greater attention. The continuing increase in pupil numbers, the rapid rise in the education level of the population occasioned by the considerable expansion of tertiary education, and – related to this – the surge in parental expectations with regards to education are all likely to propel another growth spurt, especially in tertiary education. This expansion and other reforms will no longer be financed on the back of resource savings in the wake of declining numbers (as was the case in the past). The efficient allocation of financial resources will therefore become increasingly important.

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Y. Karakaşoğlu (✉)
University of Bremen, Bremen, Germany

Y. Tonbul
Ege University, Izmir, Turkey

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48.1 History and Social Parameters of the Education System

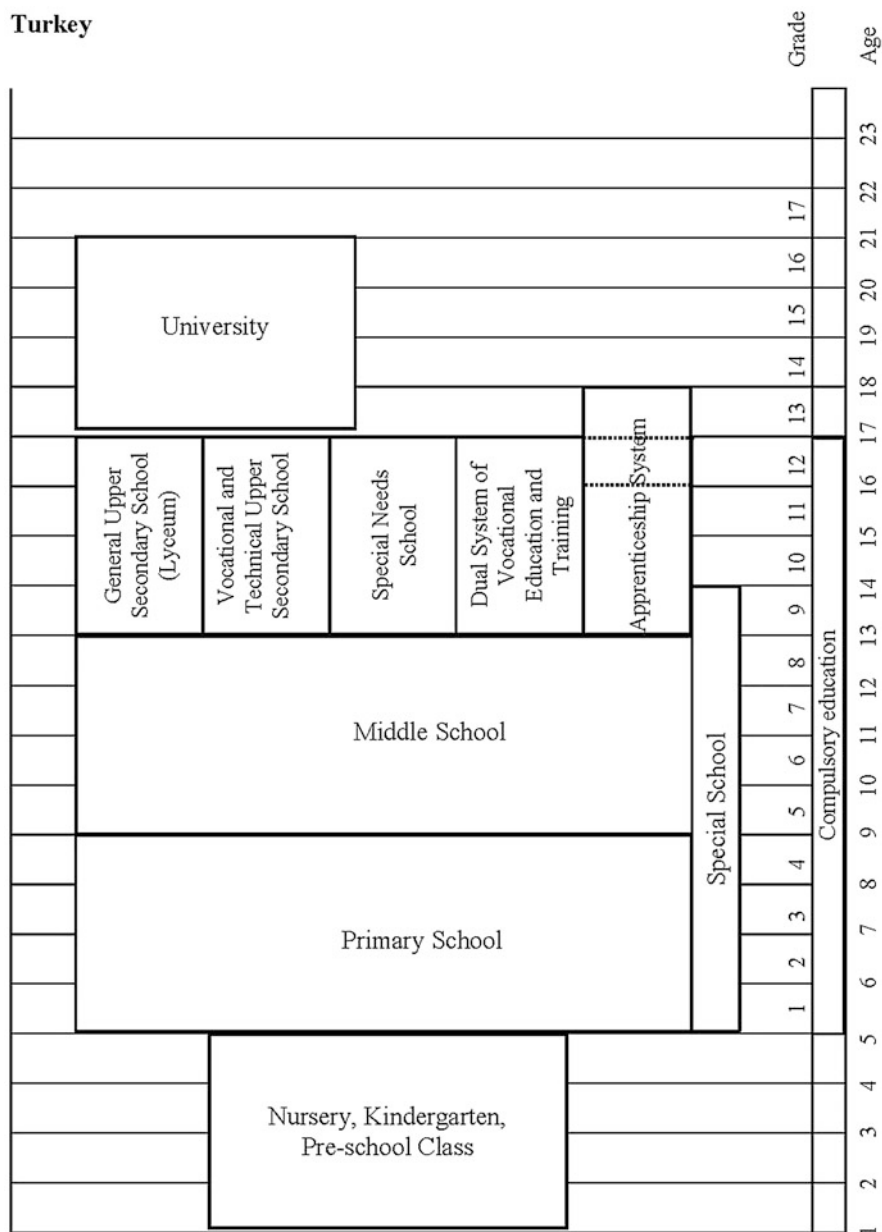
48.1.1 Cornerstones of Historical Development

In contrast to other European countries, the Turkish education system was not secularized until the twentieth century. However, since the foundation of the Republic in 1923, Turkey, as the only country among those with a mainly Muslim population, has worked steadfastly to bring its education system up to Western standards.

The young Republic broke radically with the 500-year traditions of a religiously dominated state education system, and as result of its subsequent orientation toward the West, it adopted both a positivist understanding of science and the Roman alphabet. The latter was introduced in 1928 to replace the Persian-Arabic alphabet which had been in use until then. In order to speed up the introduction of the new writing system, “Schools for the Nation” (*millet mektepleri*) were set up in the same year. Each citizen between the age of 15 and 45 was obliged to go to one of these schools. Between 1929 and 1934, 1.2 million people attended these schools.

In 1924, the Council for Science and Education defined the basic principles of primary and middle school education and teacher training which remained valid until the 1990s. The most important national education law was the Law for the Standardisation of Education National education which became the most important conveyor of the principles of the Kemalist revolution. These include the six principles of nationalism, secularism, republicanism, popularism, reformism, and statism. The aim was to educate the young to be devout followers of the Turkish nation state. These young people, oriented toward Western civilization and secularism, were to subscribe to nationalism and republicanism. Coeducation of men and women, introduced in 1926, stressed the equality of the two genders. Western kinds of sport and music as well as foreign language teaching – in Western languages as opposed to the previously taught Persian and Arabic – emphasized the orientation toward the West. In addition, the practice of Islam was strictly banished to the private sphere. Therefore, until the reintroduction of religious instruction on a voluntary basis in 1948, there was no Islamic religious instruction, no schools for the training of preachers and Imams, and also no theological faculties. The attitude of the state toward religion changed only very gradually during the first years of the Republic; the first theological faculty at the University of Ankara was opened in 1949; Imam and preacher schools were not reestablished until 1951, and lessons in religion and ethics became compulsory in 1982.

Turkey



The Kemalites' wish to create an education system open to all social classes led to the planning and creation of "village institutions" (*köy enstitüleri*) under the initiative of the Education Minister, Hasan Ali Yücel, in 1942. They arose from the desire to establish primary school education all over the country and thus

reach every village. The aim of these institutions, which were integrated into village life, was to establish a form of education that was close to practical life and that would meet the needs of the rural population. As part of this teaching program, modern agricultural methods and technologies were also to be taught. Due to their low salaries, teachers were forced to work in agriculture and were thus a role model for their pupils. Yücel had world classical literature translated into Turkish and printed in paperback form for pupils of the village institutes. This knowledge of the world influenced a whole generation of teachers that had been educated at village institutes. After 1946, these schools that had the reputation of fostering left-wing intellectuals during the Cold War era were converted into village teacher training colleges. This brought about the disappearance of an innovative educational facility that in terms of content and methodology was ahead of its time.

Until 1997, the Turkish school system was based on a clear structure of levels and school forms. Five years of primary school (*İlkokul*) education were followed by a 3-year period of middle school (*Ortaokul*). Pupils could then add a further 3- to 4-year period at an upper secondary school (*Lise*). This tiered system had been introduced gradually. When the Republic was founded in 1923, 5 years of primary education for 6- to 11-year-olds became compulsory and free of charge. It was not until 1951 that middle schools (*Orta Öğretim*) were introduced throughout the country; middle school education did not become compulsory until 1982. Middle schools, like upper secondary schools, were subdivided into general, vocational, and technical tracks. This structure is reflected in autonomous curricula, school buildings, school uniforms, and also in individual teacher training courses (Glumpler 1997). From 1997 to 2012, there were 8-year uniform primary schools (*İlköğretim Okulu*) for all 6–14-year-olds. After this pupils can receive a nonobligatory upper secondary education at a 4-year lyceum. In these decades of the 8-year primary school, the middle school section of the lyceums was closed. Initially, the Imam/preacher upper secondary schools also lost the basis for their pupils. Another reform abolished the continuous primary school education and replaced it in 2012/2013 with a three-level, 12-year compulsory schooling divided into a 4-year primary school, a 4-year middle school, and a 4-year lyceum. Compulsory schooling now begins somewhat earlier, when the child is five-and-a-half years old.

Taking the chronology of educational reforms in Turkey into account, it can be seen that the reforms were borne by educational need and waves of ideology. For the latter, the position of religious education, Imam/preacher lyceums and the theological faculties at universities are central (Sevim 2008).

Lessons in state primary schools generally last the whole day, starting at 8:50 am and finishing at 2:50 pm. Given the shortage of school buildings with appropriate equipment, lessons at many schools – particularly in cities – take place in two shifts. 65 % of pupils in cities and 27 % of pupils in rural regions have lessons in two shifts, with morning classes taking place from 7:10 am to 12:25 pm and afternoon classes from 12:25 to 5:15 pm. Until recently, lessons were largely teacher-centered, largely due to the large class sizes which made any other form of teaching

almost impossible. Above all, schools require receptive learning from the pupils. Rote learning is a particularly popular method (Akyüz 1999). Characteristic of the traditional pupil-teacher relationship that is only now slowly being replaced by new methods is the hierarchically structured interdependence of authority and love. Pupils are expected to accept unquestioningly the authoritarian structures and discipline of the school, while the teachers, especially in primary schools, show loving care of their protégés in return. The traditional methods portrayed here have, however, been gradually replaced since the start of the twenty-first century by more modern methods of teaching and learning in the well-equipped schools of the large towns and cities. Since 2004/2005, a new curriculum has been taught at primary schools that require teachers to deploy contemporary and diverse teaching methods. While current teachers are becoming familiar with these methods through in-service training, they have become a fixed component of academic teacher training.

Since the start of the 2012/2013 school year, efforts have been made to improve the use of modern technologies more effectively. Web-based teaching material has been developed for all subjects. At some schools, pilot projects have been distributing tablet PCs to pupils. This is to be extended gradually across the whole country.

48.1.2 Important Reforms and Phases of Innovation in Education and School Policies in the Last 30 Years

The foundations for the revolution in present-day Turkish education system in respect of extended compulsory schooling, the improved transition from the school to vocational education, and the improved elective and specialization option in secondary education were laid by the Law of National Education (No. 1739) from 1973. However, for the current education system in Turkey, the course was set by two major school reforms in the last 15 years. The school reform of 1997, which came into force in 1998, resulted in the abolition of both the 5-year primary school (*İlkokul*) and the 3-year middle school (*Ortaokul*) as independent school forms. Instead, 8-year uniform primary schools (*İlköğretim Okulu*) were established. It was only at this point that the length of compulsory schooling reached 8 years in practice. This was an important step in adjusting the school system to European standards. Since then, the vocational and technical school forms have no longer existed in lower secondary but only in upper secondary education. The only exception to this since 2012/2013 were the Imam/preacher schools which were the only form of school reintroduced at this level and which were entitled to teach all subjects (no longer restricted to theology). Even before the reform, there were schools that combined middle and upper secondary education, such as the Anatolia upper secondary schools (*Anadolu Lisesi*). At present, they only exist in the secondary education sector, i.e., from Year 9. In these secondary schools, a high percentage of the lessons are taught in a foreign language. The most recent school reform (Law No. 6287 of April 2011) with its obligatory primary, middle, and

lyceum schools – better known as the 4 + 4 + 4 reform – completely rearranged the school system with effect from 2012 to 2013.

The ninth and most current development plan of the Turkish government (2007–2013) emphasizes lifelong learning, improved transition management between school and work, the restructure of the education system, and the training of teachers for a knowledge-based society. In 2005/2006, a new curriculum for all primary schools was introduced that appeared to be a reaction to the requirements for the European integration process. In addition to the obligatory commitment to the principles and reforms of Atatürk, the goals of state education focus on the development of critical thinking aligned in human rights; the promotion of an active, individualized, problem-solving, pupil-oriented learning; and the promotion of a democratic culture. Turkey is thus committed to retaining reference to the fundamental principles of the Turkish Republic, the contents of the Lisbon Strategy, and the Bologna Process. The basis for this is an increase investment in education. Since 2003, the campaign “Girls, come to school!” has successfully countered the uneven participation in education in favor of girls, which is particularly striking in the eastern, rural provinces. Preschool education is currently being promoted under the slogan “3, 4, 5 – start school early.” Efforts are also being made to push ahead with the dual (sandwich) system of vocational education. Since 2005/2006, secondary education in general, vocational, and technical tracks has increased from 3 to 4 years. In teacher education, an income system has been established based on in-service training and individual performance. Vocational qualifications were modularized and are now oriented toward EU standards to achieve the greatest possible compatibility (ERG 2007).

48.1.3 Political, Economic, and Cultural Framework for the Development of the Education System

Turkey is a parliamentary democracy. The 81 provinces that are themselves subdivided into rural districts and municipalities are administered centrally by the National Ministry of Education (*Milli Eğitim Bakanligi*, MEB). The central government is seated in the capital Ankara.

Ninety-nine percent of the population are Muslims (about one third belongs to Shiite subdenomination of Islam, the Alevites, a specifically Anatolian group of nonorthodox Shiites and two thirds are Sunni); the rest is made up of various old-oriental Christian confessions, Jews, and other religious communities such as the Yazidi among the Kurds and the Persian Zoroastrians. Besides immigrants and refugees from the Balkans, the Mid and Far East, and the former Soviet Union, Turkey has a large ethnic diversity in its autochthonous population with more than 45 different ethnic groups. The largest of these are the Kurds from the South East of the country and the Laz in the North East. The official language is Turkish. As part of the convergence process aiming at integrating Turkey in the European Union, Kurdish language broadcasts went on air for the first time in 2008, and Armenian programs were broadcast on Turkish state television. Given the dynamic internal

migration – primarily from rural regions to the cities – the various ethnic groups can now be found in all parts of the country. Originally a very rural country, 65 % of the population of Turkey now lives in cities, and its proportion continues to increase due to the urban birth rate and the ongoing geographic mobility.

Population growth has been on the decline since the 1980s, a trend that has followed the increase in the standard of education of the population. However the education system is facing an enormous challenge: with a total population of 75.6 millions (2012), the country has to equip a large group of children and teenagers with sufficient educational opportunities in the primary and secondary sectors that represent half of the population. An average primary school class has 26.3 pupils (in 2000 it was 30) (OECD 2013, p. 372) with strong fluctuations from region to region. In conurbations such as Ankara, Istanbul, or Izmir, classes can have up to 50 pupils. According to official statistics, 98.86 % of the 6–14-year-old cohort attended primary school, and 70.06 % of 14–17-year-olds attended school in 2012/2013. Attendance rates for the tertiary sector amounts to 38.5 % of the relevant age group (Milli Eğitim İstatistikleri Örgün Eğitim 2012–2013). Even though a significant improvement can be seen over time, in 2010, 24 % of 15–19 year olds were neither in education nor employed (OECD 2012, p. 285).

At present, only 25 % of the 24–65 age group is described as “well educated” (ISCE 1–3), and only 14 % of the population in this group had a university degree in 2011 (OECD 2013, p. 37). This is the lowest level of all OECD countries. 57 % of this age group has passed through primary school, but no more (OECD 2013, p. 35). However, the educational participation in younger age groups has improved dramatically. Unlike most other OECD countries, females do not achieve better in education than men; instead, they are only being to approximate male achievement (OECD 2012, p. 67; 2013, pp. 58, 61). One of the problems in the tertiary sector is that although more than half an age cohort are entitled to attend university, only one third actually does. A quarter of the population lives below the poverty line. This is particularly startling for children under 14, one third of them live below the poverty line (ERG 2012, p. 65).

The connection to participation in education is made all the more clear by the fact that more than half of the children of an age cohort who do not attend primary school live below the poverty line (*ibid.*). Children in rural areas are more affected by the situation than those who live in urban areas, and children in eastern provinces are more affected than those from western provinces. Another factor of disadvantage in education is gender. For every 100 boys who completed primary school in 2005/2006, there were only 85 girls. The situation is even more uneven in secondary school, where only 75 girls are enrolled in a form of secondary education for every 100 boys. Here, too, regional differences play a role: fewer girls go to school in the South East than in the West of Turkey (*cf.* the results of PIRLS 2001). Such bias can be explained by the dominating traditional belief, especially in parts of the rural community, that women’s main role is that of wife and mother for whom formal education, vocational training, and work are not desirable goals in life.

Since the first teacher training institutes were opened in 1848, Turkey has practiced many different models of training teachers, and all of which lacked continuity (Kaya 2009). The high-quality training of aspiring teachers still

manifests the following problems: prospective teachers are primarily interested in the profession for the related job guarantee (Özbek et al. 2007); entrance examinations for teacher training courses are of a relatively low level and do not correspond to the demands of the profession (Hotaman 2011; Uygun 2010); and it is still not clear where heads of department in middle schools are to recruit teachers for specialist subject such as mathematics, natural sciences, and literature from and what their qualification should be (Yüksel 2011). There is still no long-term planning security for the deployment of trained teachers (Akyüz 2005). However, the 2012 empirically supported monitoring project commissioned by the MEB “The Development of Projections, Strategies and a System to Appoint Teachers” is currently assessing methods of calculating staffing needs (ERG 2013).

Because of its civil service status, the teaching profession is still esteemed, but salaries are still unsatisfactory today. They vary according to performance and service; the annual salary of a primary school teacher in the first year of service (with additional specialist subject work) is 12,500 US \$; a teacher with 25 years of service can currently earn \$14,400 (<http://www.kamudanhaber.com/meb/derece-derece-ogretmen-maaslari-h213397.html>).

Given the notorious shortage of teachers, shorter special teacher training programs have been offered time and again. These programs have tended to damage professional reputation. More recently, a trend can be observed: the reform of teacher training and performance-related remuneration appear to have again improved the image of the profession (Karakaşoğlu 2007b).

48.2 Fundamentals, Organization, and Governance of the Education System

48.2.1 Current Educational Policy and Goals of the Education System

Until recently, the basic educational principles were aimed at a secular, rather than a religious, and at an international, rather than a national, form of education. However, both principles have experienced reinterpretations in the course of recent decades which have led to Islamic religious education being taught as a compulsory subject at state schools since 1982, and the international compatibility of qualifications and orientation to European standards has been a key focus of schools since 2005. Further principles of the Turkish education system laid down in the Reform Law No. 4306 of 1997 are: equal opportunity in accessing education; coeducation; the adaptation of the curriculum to social requirements; a long-term educational plan (included in the government’s nationwide 5-year development plans); continuity of education by enabling lifelong learning; scholarliness and an orientation toward the reforms of Atatürk as the basis of all lessons, regardless of subject and the age of pupils; close cooperation between school and parents; and nationwide expansion of education for everyone.

The aims of the Turkish education system as regards the development of individual personality are laid down in Article 2 of the Basic Law on National Education. Here, an image is conjured of a good citizen who feels closely connected with the reforms of Atatürk and the nationalism as expressed by the founding father and who has internalized the ethical, ideological, historical, and cultural values of the Turkish nation.

Following the efforts of reformers, the national education should instill a definite cultural identity and should develop free-thinking people who respect human rights. The importance of these principles is reflected in the school oath which pupils have had to pledge together at the beginning of each school day since 1932.

Current goals of education include total inclusion in preschool education, the establishment of full-day schooling and the minimizing of double-shift schooling, a higher transfer rate to upper secondary education, an improvement of the education situation for girls and children that live below the poverty line, and improved access to educational facilities for children from rural regions. Furthermore, the targeted preservice and in-service training of teachers should encourage a shift away from traditional, authoritarian forms of teaching in favor of a more democratic manner of working together between pupils and teachers and should support critical thinking by pupils. The aim is to achieve complete affiliation to European standards in education in terms of structure and content although the wide-ranging structural reforms carried out in short intervals have been implemented without reasonable prior public discussion of goals, forms, and consequences (ERG 2013).

48.2.2 Legal Framework

The introduction of Law No. 3115 of 1937 placed all forms of education under the supervision and control of the state. Paragraph 50 of the 1961 Constitution conferred the task of ensuring citizens' educational opportunities to the state. The state is obliged to enable particularly gifted children from socially weak families to take part in education at all stages by providing scholarships; it is furthermore required to safeguard the education of members of the population who have special educational needs. The foundation for the present-day education system in Turkey was laid by the Law on National Education No. 1739 of 1973. While originally, the law mentions an obligatory basic education for all citizens of the country, this was reformulated by Law No. 4306 of 1997 and the related central restructuring of the education system into compulsory attendance of primary school education provided free of charge. The new legal basis for the restructuring of the system to a 4 + 4 + 4 structure is provided by Law No. 6287 (ERG 2011, p. 20).

Turkey has signed up to international agreements relevant to education such as the UN Declaration of Human Rights from 1948, the UN Convention on the Rights of the Child from 1995, and the UN Development Goals for the new Millennium from 2000.

48.2.3 Governance of the Education System

Educational planning is part of a general development plan which has been elaborated every 5 years since 1961. After this period of time, parliament is presented with a report in the implementation of the plans. Currently, the 9th Development Plan (2007–2013) represents the basis for all decisions and reforms in the education system.

The Turkish education system is administered centrally. The highest controlling and directing agency is the Ministry of National Education (MEB). The Ministry is the body which takes decisions on, creates, and is responsible for every form of education and training. Decisions made by the Ministry are binding on all educational facilities in Turkey. All private schools and universities are subject to the supervision and control of the MEB. Only since 1993, responsibility has also been delegated to local provincial administrative bodies. Nevertheless, all decisions taken in the educational sector must be approved by the MEB. The MEB itself is structured hierarchically. In addition to the ministerial administration in Ankara, the MEB is represented by province level by education directors appointed centrally. In order to create the basis for more decentralization in education, the MEB has established a number of new organizations and institutions since the year 2000. These are the Class Teachers' Council (*Zümre Öğretmenler Kurulu*) and the Directors' Council (*Müdürlük Kurulu*), both of which are subordinated to the Educational Regions Advisory Committees.

The Education Law draws a fundamental distinction between formal schooling (*örgün eğitim*) and informal out-of-school education (*yaygın eğitim*). In formal schooling, by means of central control mechanisms, the Ministry aims at a high degree of uniformity and conformity both in appearance (expressed in the type of school building, school uniforms, etc.) and in content (uniform teaching plans, same books, methodological explanations, preparation requirements for teachers, etc.) especially for primary schools. By and large, this is also achieved. Only since 1992, increased variety in form and content is permitted. Given its inflated bureaucratic machinery, the MEB is said to be largely sluggish and to have limited function (Sakaođlu 1999, pp. 122–124).

48.2.4 Funding the Education System

The state education system is financed from the national educational budget and from the funds and resources of the provinces. Attendance at state educational institutions is free of charge. Since the introduction of neoliberal politics in the 1980s, there have been incentives for private investment in education in the form of various tax relief and subsidies (Türk 1999, p. 33). The current reform in school structure and the related increase in compulsory education from 8 to 12 years have increased funding requirements which the government is meeting by increasing education's share of GDP.

However, Fig. 48.1 clearly shows the gap between the budget allocated for this key educational reform and the actual costs. Particular costs have arisen because

Grafik 2: MEB bütçesinden yatırıma ayrılan pay (%)

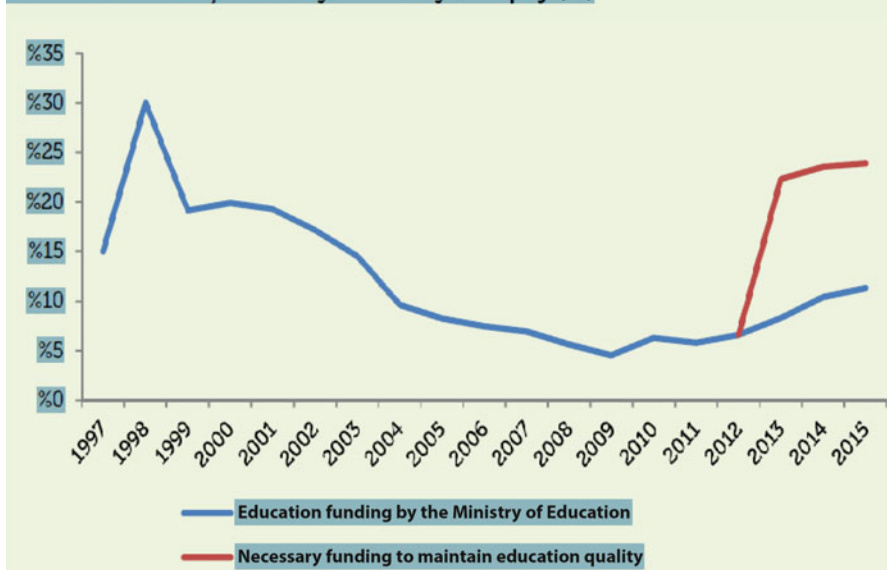


Fig. 48.1 Education funding by the Ministry of Education (MEB) in % (ERG 2011 http://erg.sabanciuniv.edu/sites/erg.sabanciuniv.edu/files/MEB_Butce_2013_PolitikaNotu_SON.pdf)

government policy is targeting 100 % preschool attendance for children between the ages of four and five, because the age for starting school has been brought forward and because compulsory schooling has risen from 8 to 12 years. In order to maintain the quality of teaching in middle schools alone, at least 100,000 additional teaching positions are necessary (ERG 2011).

In 2011, Turkey allocated 4.2 % of its GDP to education (ERG 2013). Even though the proportion of GDP allocated to education has increased in the last few years, *pro rata* Turkey's education expenditure is still significantly below the OECD average. Accordingly, Turkey annually invests \$1,130 for each primary school child and \$1,834 for each middle school pupil. The OECD average is \$6,437 and \$8,006, respectively.

The decision to permit freedom in the choice of teaching materials meant that free books have been distributed to primary school children since 2003/2004; lycées followed in 2006/2007. Part of the costs for the equipment and maintenance of schools are levied directly from the parents in the form of a "contribution to education."

48.2.5 Relationship Between the Public and Private Sectors in the Education System

In addition to state institutions, increasing numbers of private schools are being established in the large towns and cities with the support of the state. They

complement the education offered by state schools and extend the educational opportunities for elite. Since 1980, the state itself has increased its range of elite schools with the Anatolia upper secondary schools (*Anadolu Lisesi*) and “super lyceums” (*Süper Lisesi*). In both these school forms, lessons take place mainly in a foreign language, and as an extension of the general upper secondary schools. they introduce a hierarchical structure which undermines the idea of equal opportunities in the education system. Teachers are appointed based on an internal appointment assessment. In aiming to increase the quality of middle school education and encourage more pupils to attend vocational schools, some of the general lyceums have to be turned into Anadolu lyceums, some into vocational lyceums. This trend can also be found in higher education. The University Law of 1991 enabled private investors to establish “foundation universities” with loans at low interest rates and up to 45 % state subsidies from the education budget. At private universities, students who fail to attain the required grades in their entrance examinations for state universities can take up a course of studies for a relatively high fee. All of the private schools and universities are under the supervision of the MEB, which also approves the use of relevant textbooks. Even private schools are obliged to take account of principles of national education when setting their own educational goals and determining content, and they are obliged to take at least 2 % of their pupils from less affluent families and to waive school fees for them. In order better to counter both qualitative and quantitative problems in education, private investment in education has been fully tax deductible since 2003.

48.2.6 System of Quality Development and Support in Education Facilities

In 1961, the National Planning Department (*Devlet Planlama Teşkilatı*) was created as an advisory body for the educational planning of the country. In addition, regular meetings of the National Education Council (*Milli Eğitim Şuraları*) take place to identify problems in the education system, discuss these with experts, and present solutions. In addition, the regular five yearly checks within the framework of the 5-year plans to compare planned and achieved targets are key instruments of evaluation for the MEB. A further instrument of quality control consists of the annual final examinations of the schools and the central university entrance examinations. In an international context, Turkey is a founding member of the OECD and takes part in projects such as the annual statistics handbook *Education at a Glance*, which contains comparative data from all OECD member states and takes part in international studies to compare school achievement such as PISA, TIMMS, PIRLS, and IEA. An example of a new approach to improve the quality in terms of effectiveness and transparency implemented by the MEB is the Total Quality Management (TQM) program which has been running for more than 10 years (Karakaşođlu 2007a, p. 796). This has required the in-service training of teaching staff and the deployment of school inspectors who use TQM criteria to

define the quality of schools and set reform targets. Evaluation studies on the introduction of the TQM shows that teaching staff, more used to centralist structures, have not yet internalized the management structure based on local needs required of the TQM although TQM committees have been set up at all schools since 1999 to establish the new system (Kartal 2008).

48.3 Overview of the Structure of the Education System

The Turkish education system is divided into the school education sector (*Örgün Eğitim*), which consists of preschool, primary, secondary, and university education, and the education sector outside of schools (*Yaygın Eğitim*), which comprises adult education and correspondence courses. The school year in Turkey covers 180 workdays. Each lesson lasts 40 min in primary and middle school and 45 min in lycées. As well as academic achievement, social behavior/conduct is also assessed and forms part of the general assessment when pupils leave primary school.

48.3.1 Preprimary Education

Preschool institutions are mainly attended by those children who are not yet old enough for compulsory schooling, i.e., the group of 3- to 6-year-olds. These schools are not very common in Turkey; 98 % of them are in large towns and cities. The majority of these are state owned; only a small proportion is in private hands. The institutions can be divided into independent preschools, preschools linked to a primary school, and school kindergartens. There are (a) nursery schools for children of up to 3 years of age, (b) kindergartens for 3- to 5-year-olds, and (c) preschool classes for 5- to 6-year-olds. The aim of preschool education is to support and encourage the emotional, physical, and intellectual development of the children; to teach them good manners; to prepare them for primary school; and to teach them good Turkish. Apart from this, they should foster the development of children from socially weak families and those growing up in an unfavorable environment to provide these children with better development opportunities.

The fees for preprimary schools are paid by the parents or the parents' employers or are alternatively subsidized by the state, depending on the type of institution. In this way, it should be possible for children from socially weak families to also enjoy preschool education. Supply can never meet demand, however, especially given increasing urbanization and, related to this, the growing number of women working outside the home. Although still at a relatively low level, the number of preschool facilities is increasing rapidly. From 2000 to 2008, attendance at a preschool facility increased from 7 % to 26 % for children aged between 4 and 6 years. In the meantime, this has since risen to 35.7 % with the trend still rising. The aim of the new 4 + 4 + 4 reforms is to achieve 100 % attendance at preschool level (ERG 2012).

48.3.2 Primary Education

An amendment to the current Education Act (30 March 2012) changed the age of compulsory attendance in the primary sector from 6–14 to 5–13. The primary sector comprises 4 years of primary school and 4 years of middle school education. These schools are now organized independent of each other. Depending on local circumstances, primary and middle schools or middle schools and lyceums can become affiliates. Pupils who have not passed any certificate at the end of compulsory schooling and after extending primary education by 2 years are guided to distance learning primary schools (*Açık İlköğretim Okulu*) or to vocational educational centers.

Special entrance tests are not envisaged for these. However, because of the great demand for private schools, several of these institutions have introduced tests by means of which they choose the most gifted children among the applicants. In 2006/2007, 96.4 % of pupils in the relevant age group actually attended school. There are still town-country and east-west divides in terms of quality, quantity, and the take-up of school provision.

Primary school education, especially in the first 4 years, has an important role in creating a strong sense of citizenship. The inculcation of the state ideology of Kemalism thus plays a significant role in such subjects as social studies, Turkish, social science, religion, and ethics (Gök 1999). With the introduction of the 4 + 4 + 4 system, the number of electives has increased; subjects such as Koran studies or the Life of the Prophet were added and can be voluntarily chosen as an elective from the beginning of Year 5. In Imam-Hatip-Schools these Islam-related subjects are mandatory from Year 5 onwards.

48.3.3 Secondary Education

Optional secondary education, which is not divided into lower and upper levels of secondary education, is aimed at preparing pupils for a university course or for vocational training. All pupils with a final certificate from primary education have the right to continue their schooling at lyceum. Pupils at this stage can attend a general lyceum, a commercial/technical lyceum, a vocational school, or enter a form of dual (sandwich) training. If there is no suitable lyceum in their vicinity or if pupils do not have the grades required to attend a local lyceum, they may attend courses at a distance learning facility (*Açık Öğretim Lisesi*). Secondary school education has been extended by a year from 2007 to 2008 and now comprises the 14–17 years age group. In 2006/2007, 86.6 % of pupils in the relevant age attended this level of school. During the first year, pupils may change between general and technical lyceums; thereafter, it is only possible for pupils to change the program and subjects within a school. At present, 62 % of pupils attend a general lyceum, and 38 % commercial/technical lyceum.

The possibilities at this stage can be roughly divided into general upper secondary schools/lyceums and vocational and technical upper secondary schools/lyceums. They offer pupils an appropriate general education at secondary school level and prepare them for a profession or study at a university.

General upper secondary schools can be divided into (a) Anatolia lyceums (with a significant element given in a foreign language), (b) vocational lyceums, (c) scientific secondary schools, (d) Anatolia teacher training schools, (e) Anatolia secondary schools for fine arts, (f) evening school lyceums, (g) private lyceums, (h) distance learning lyceums, (i) military lyceums, and (j) police lyceums. At Anatolia (Anadolu) lyceums, blocks are reserved for children of returning emigrants. The initiative behind these schools was borne by the notion of easing the integration of children of returning guestworkers and their descendants in Europe into the Turkish school system and retaining the potential they brought back with them for foreign languages. The most popular form of school is the general lyceums whose qualifications enable pupils to study at university provided they pass an additional entrance examination.

Vocational and technical lyceums exist parallel to the general education lyceums and provide professional qualifications as well as the prerequisites for passing the university entrance examination. They can be divided into technical schools for girls and for boys, respectively, schools for trade and tourism, and Imam and preacher secondary schools. According to the Law on National Education No. 1739, it is also possible to offer a form of comprehensive school (*Çok Programlı Lise*) as a secondary school which comprises general, vocational, and technical schools under one roof.

48.3.4 Special Needs Schools

The development of special schools in Turkey has been very moderate. The first schools for physically disabled children were opened in the 1940s. These were schools for children with impaired hearing or sight. In 1955, the first class was opened for mentally challenged children. Paragraph 50 of the Constitution of 1961 established the right of children who require special schooling to receive support with regard to their contribution to society. In 2006/2007, 27,439 children with special education needs received an education at special schools. A further 9,201 children were taught in special classes and another 64,297 were in regular classes (*kaynaştırma eğitimi*) as part of inclusive modules. Centers for special education and rehabilitation are commissioned to support children at regular schools, especially those with learning difficulties, problems adapting, or with psychological problems. Estimated at 100,000 pupils, this particular group has trebled in size in the last 10 years. However, there are a total of 253,000 children with special education needs aged between five and 14 years; in other words, children often do not receive the support they need. For example, only 5,429 of the hearing-impaired total of 25,000 children were able to attend an appropriate school in 2006/2007. Since 2005, the state has been making efforts to improve the schooling opportunities for children with special education needs. Among other things, this has included committing to law (Law No. 5378 of 1 July 2005) the right of social disadvantaged children to free education and rehabilitation (ERG 2007, p. 42).

The state has envisaged special forms of school for potentially gifted pupils since the sixth 5-year plan (1990). Some knowledge and art centers have

been established but these are not widely distributed. Here, too, there is a need to expand these opportunities.

Special school teachers receive a 4-year special training at education faculties.

48.3.5 Post-secondary and Tertiary Education

The development of vocational training within and outside of school is a significant issue in the 5-year plan issued by the MEB. For years now, Turkey is trying to replace the traditional form of apprenticeships in companies with the German model of dual training. To date however, this form of dual training is still rather the exception. In Turkey, vocational education ranks far below professional university-based training, and this has contributed to the large numbers of students applying for places at Turkish universities. In addition to the traditional vocational training that to date is not subject to any standards and does not contain any theoretical training, young people can also take part in vocational education programs at public or private commercial colleges or in vocational or technical lycées. In addition, there is also a form of dual training that is successively being developed.

In traditional vocational training, after the period of compulsory schooling, boys or girls are given practical training in a company by the master. The proprietor of the company who carries the title *Usta* (master craftsman) leads the apprentice through practical as well as theoretical elements of the training. This training on the job takes place on the basis of an oral arrangement between the parents and the master or between the apprentice and the master. Depending on the proficiency of the apprentice and the assessment of the master, the apprenticeship can take between 3 and 5 years. At the latest, the start of military service signifies the end of the apprenticeship. If the master is satisfied with the apprentice's skills, he awards him or her the title of *kalfa* (roughly meaning journeyman) at the end of the apprenticeship. This qualification is confirmed by the Chairman of the Trade Association and documented by the Journeyman's Certificate. If the master regards the journeyman as well qualified, the latter can apply for a trade license after 1 year, which allows him or her to open his own workshop. Since 1997, centers for the training of apprentices have been changed into vocational education centers. Pursuant to the Law on Vocational Education of 2001, young people who work in a company as an apprentice and aspiring to become journeymen, or later masters, have to attend these centers one day per week. Titles are only awarded once the training has been completed successfully and the diploma program passed. Since 2005/2006, such training lasts 4 years. The master's certificate can be acquired after a further period of study of 2–3 years at an adult education facility (*Yaygın Eđitim*). By compiling criteria for a wide range of vocations and developing a modular system based on ISCED 97 standards, vocational education is getting closer to a dual system.

School-based vocational education takes the form of vocational and technical lycées and vocational and technical Anadolu lycées. In 4 years (prior to 2005/2006, it was 3 years), they prepare pupils for the world of work and for enrolment at

a university. After completing a vocational lyceum, pupils may study the subjects they majored in at the lyceum at university without having to take an entrance examination in the enrolment process. The qualification from a 4-year technical or commercial lyceum is equivalent to a master craftsmen's title and entitles the holder to set up business on their own. Vocation lyceums also include Imam/preacher schools and preparatory schools for noncommissioned officers.

The higher education system in Turkey has experienced a particularly rapid development over the last 70 years. In 1933, the *İstanbul Darülfünunu* (House of Science), founded in 1863, was one of the first Turkish institutions to become a modern university and was restructured to become Istanbul University. Above all German scientists, many of whom fled Nazi Germany, played a major role in the development of the Turkish university system. In response to the growing demand for university studies, a central university entrance examination was introduced in 1963/1964. These exams are carried out nationwide once a year by the Allocation Office for University Places (ÖSYM), directly responsible to the University Council. The scores achieved form the basis for the central allocation of applicants to subjects of study and universities. The average of the final diploma from upper secondary school and the scores assigned to individual secondary schools according to an established scale are taken into consideration (DPT 2000, p. 17). This latter measure is intended to improve the quality of access of pupils from less prestigious secondary schools to a university course of study. In 2013, Turkey had 168 universities; 103 of which were state and 65 foundation universities. At 14 universities, lectures are given completely in English or French. Turkey is one of the few countries in which the proportion of women in technical faculties is higher than the 30 % threshold (OECD 2013, p. 298). In 2001, Turkey joined the Bologna Process. European Studies offered at 29 universities strengthens the countries European thoughts. Since 2006, the country also takes part in the EU Erasmus program. This has proven to be a key factor in the internationalization of studies at Turkish universities. In 2012/2013, 144 countries took part in the Erasmus exchange program. Besides Germany, Poland, Italy, Spain, and the Netherlands were the preferred partners to Turkish universities in the Erasmus program (Türkiye'de Erasmus 2013).

48.3.6 Adult and Further Education

All training activities following or complementing initial professional training that targets people over the age of 14 years are referred to as informal training. Exceptions to this are for educational activities in adult education in which initial professional training qualifications are acquired retrospectively. This adult and further education is offered to people who either have never been involved in general school education or have reached a certain level of regular schooling or have dropped out or interrupted their school education. The tasks involved are also accordingly varied: adult literacy, expanding general knowledge, vocational education, and extending the opportunities to secure a living. The Directorate for Lifelong Learning is responsible for coordinating and developing the service of vocational and adult education.

Adult and further education includes national education, professional training, and distance learning. In addition, vocational and technical lyceums offer specific professional courses as part of informal education. Facilities in this category include evening school centers, vocational education centers, practical schools for women's professions, development institutes, industrial training schools, technical adult education centers, hotel and tourism education centers for adults, coaching courses, private vocational colleges, and private science and arts centers (ibid). Various general directorates in the MEB are responsible for these facilities and programs. Particular noteworthy are the evening school centers where a wide variety of courses are offered for people of all ages. The centers can be found in provincial capitals or in rural districts, but many courses take place locally in communities and villages. Generally, courses are organized by need, if at least twelve people register for it. For special topics, such as traditional handicraft courses, the number of participants can be lowered.

As well as highly frequented literacy courses, adult education facilities also offer professional development courses that provide an opportunity for adults to catch up on qualifications they missed out on during their formal education. In addition, there is a large selection of sociocultural and creative courses. Artisan development institutes for girls (*Kız Teknik Öğretim Olgunlaşma Enstitüleri*) have proven to be particularly popular. These provide a comprehensive range of courses teaching traditional Turkish handicrafts in history, research, technique, and practice. Depending on the course, participants might need to have passed primary school or lyceum programs before taking a course. The 2-year course concludes with an examination for which a diploma is awarded, roughly equivalent to an apprentice's certificate. Afterwards, learners can try their hand at master craftsmen courses (ibid).

Although informal adult and further education courses are in huge demand – in 2005/2006, 4.5 million people took part in such courses – teaching staff are not necessarily adequately trained and there is often a shortage of rooms and material equipment at the facilities. However, in comparison to the EU average, participation in adult and continued education is still very low. In 2011, participation was at 2.9 % whereas in the EU, participation amounted to 9.1 %. Plans target a participation rate of 8 % by 2015 (Hayat Boyu Genel Müdürlüğü 2012).

There are currently three universities in Turkey that offer courses in adult and continued education. The vast majority of teaching staff in adult and continued education is not trained for this sort of work. In the best case, they may have attended a further education course themselves.

48.4 Developments in the Current School System

48.4.1 Transfer Between School Years

The transition between schools is subject to constant attempts to reform the system by the education administration. In very short intervals, new systems are introduced only to be discarded in favor of others. In principle, the system is characterized by

centrally organized final examinations following frequently changing division of regular schooling. Reforms then refer to school years in which examinations have to be taken, the frequency of the examinations, and the calculations of average marks from these examinations. One constant in this system is the use of multiple-choice testing for centrally organized examinations. However, with the introduction of a wide range of electives, examinations are increasingly calling on written answers through the use of open questions. Before pupils change from primary to secondary education, they have to take twelve centrally organized examinations in Year 8. These include natural sciences, mathematics, Turkish, a foreign language, religious instruction, Kemalism, and the history of the revolution. Average marks attained in the examinations determine the distribution of pupils in Anadolu lyceums, natural science lyceums, lyceums with special status, super lyceums, lyceums with a broad range of programs, etc. As was the case with other examination systems, this new system is being criticized for not doing justice to the educational process, for causing stress, and for supporting the private coaching institutes.

The system of multiple-choice testing itself also affects the award of university places and the postgraduate opportunities. While the university entrance examination (*Yükseköğretime geçiş sınavı/YGS*) focuses on general education and mathematical and language skills, the entrance examination for postgraduate study (LYS) concentrates on the content of the disciplines selected. Here, too, university admission is based on the average marks from these examinations, which cannot fall below a certain threshold. Allocation to a subject is based on average marks, the student's preferences, and the availability of places. Study programs usually cover 4 years. Graduates from vocational lyceums can be accepted to study a 2-year program in the respective subject without having to take the entrance examination. In 2013, 1,923,033 people took the university entrance examination (ÖSYM, LYS istatistikleri 2013).

48.4.2 Quality Development and Quality Assurance Measures in Schools

The uniform school system and the MEB's central monitoring and control of public and private school facilities provide little leeway for the development of individual school programs although the TQM has explicitly mentioned this (ERG 2007, p. 65). The curriculum for all schools is developed and determined centrally by the MEB's general directors responsible for the respective school levels and forms. Textbooks for all levels of school are compiled and published partially by the MEB, partially also by authorized publishers.

The results of the international PISA study of school achievement clearly show that Turkey is far below the OECD average in skill areas such as reading, mathematics, and natural sciences. This was explained by the need to learn content far removed from the lives of the pupils, an over-concentration on pure knowledge learning, and the teacher-centered nature of learning. In the light of this, a new

curriculum was introduced which provides more learning time in Years 4–8 for natural sciences and technical education, for learning a foreign language in Year 4 and 5 and the introduction of one lesson in all years for guidance and social activities. Electives “critical thinking,” “media literacy,” and “chess” were introduced; “elocution” and “handwriting” were removed. These significant reforms did not help Turkey achieve the targets it set for the PISA study 2009. The 2011 TIMSS test showed that one quarter of pupils in mathematics and natural science did not know more than some basis knowledge (ERG 2013, p. 4). Studies reveal that although the new curriculum has been accepted by teaching staff, large class sizes, poor conditions in classes and the insufficiency of material equipment in classes, teacher training, and examination stress still prevent adequate improvement from being made (Gelen and Beyazıt 2007).

48.4.3 Dealing with Special Problems

Despite numerous programs delivered by social organizations and the state, the educational disadvantage of girls and women is still a deep problem in the Turkish school system. While general illiteracy rates have dropped significantly – in 1930 it stood at 80 %, in 1960 at 60 %, and in 2000 at 14 % – in 1999/2000, female illiteracy still stood at 22.6 % compared to 2.4 % for men. Statistics show that illiteracy rate for over 15-year-olds currently stands at 5.08 %. In the southeast of the country, a region that largely accommodates Kurds, the rate of 12 % is more than twice as high. The gap in participation in the education system by gender is not only evident at the beginning of the primary school, but widens at higher levels of formal education (ERG 2007, p. 38). The MEB has responded to the issue over the years with a number of campaigns and programs that primarily serve to provide parents of girls with an insight into the necessity and benefits of education and to create the conditions for parents to gain this insight. In 2003, for example, a campaign was instigated by the MEB in conjunction with UNICEF under the slogan “Girls, come to school” in ten provinces in the east and southeast of the country. This has now spread throughout Turkey and has made it possible for 222,800 girls to attend school. In addition, a financial incentive scheme (monthly state benefits) was developed to encourage parents of children in preschool age to send their children to school. Last year, children in 1,527,716 households benefited from the program.

In regional studies, a considerable proportion of teachers in Turkey showed a relatively high affinity to authoritarian teaching methods through to methods that accept violence (Karakaşoğlu 2007b, p. 409). With a view to changing this attitude, in 2006 the MEB set up a work forum entitled “Minimizing and Avoiding Violence in Education” whose main instrument is in-service training on the issue.

Educationalists also see a problem in the fact that the regular school system refers pupils who have not been able to acquire any certificates during their regular schooltime to the distance learning system without solving the problem within the system, i.e., through stronger care and guidance focused on the individual. They have also identified problems with the stereotypical representation of gender roles

in current Turkish textbooks as well as the restriction of the presentation of religious content to that of Sunni Muslims instead of multiconfessional religious instruction. Here, as in other areas of school classes, there are significant deficits in respect of intercultural and tolerance education.

48.4.4 Measure to Integrate Pupils from Immigrant Families/ Minority Students Education

Because there are no statistics on the proportion of foreign pupils and pupils from migrant families and no educational strategies on how to deal with this group of people, no discussion of the issue can be presented here. However, there is no doubt that Turkey has an increasing population of migrant families: Turkey is an important transit land from migrants from the East heading to the West and accepts refugees and (mainly illegal) working migrants from bordering countries in high numbers. In view of the existing political and economic instabilities – especially in Turkey’s eastern neighbors – it is safe to talk about a high migration potential in the country.

The public education system in Turkey focuses explicitly on Turkish nationals. It is possible for non-Turkish citizens to attend school as part of exception procedures and goodwill on the part of those responsible, and this is widespread and standard. Data is available however on the school situation regarding pupils with a “forced internal migration background.” These are pupils whose families have been forcibly relocated because of political unrest in the east of the country and/or whose families have illegally settled on the edges of major cities and who have been forced to give up their self-built homes by public authorities. ERG estimates suggest that 350,000 pupils under the age of 15 were affected between 1986 and 2005. Such children were overrepresented in statistics on educational disadvantage expressed in having to repeat a school year or in absenteeism (ERG 2007, p. 45).

A further problem in Turkey concerns the autochthonous minorities. In contrast to the recognized ethnic-cultural minority groups expressly mentioned in the Treaty of Lausanne (1923), such as the Greeks, Armenians, and Jews, the ethnic minority groups of the Kurds, Circassians, and Laz – to mention just a few of the approximately forty-five different groups living in Turkey – do not have their own schools. Schools for recognized minorities are part of the private school sector. From the beginning of 2013/2014, minority languages such as Laz are offered as one of the compulsory optional subjects. There are already syllabi for Kurdish Adygei.

Lessons in minority schools are in the language of the minority. The Turkish language and culture are mandatory subjects as are Atatürks principles; Turkish nationality, secularism, and equality are significant aspects of the content of lessons. These schools are monitored by the MEB which also approves textbooks used at the schools. As private schools, they are obliged, in compliance with Article 42 of the Constitution of 1982, to orientate their activities to the level of state schools.

When setting their aims and shaping curriculum content, they need to take account of the aims and fundamental principles of National Turkish Education. According to the Law of the Harmonisation of Education, they are obliged not to

give lessons based on religious principles or the distribution religious propaganda. Furthermore, religious symbols are not permitted in school buildings. In addition, they have to accept at least 2 % of their pupils free of charge. Generally, new facilities cannot be established; however, existing facilities may be expanded given the approval of the MEB. Today, the vast majority of pupils from these international and minority school are of Muslim origin.

Since the 1990s, there have been discussions on giving lessons in Kurdish for the largest ethnic minority in Turkey. However there does not seem to be a quick answer to this issue in favor of Kurdish needs. While the Constitutions of 1924 and 1961 contained the passage “The official language of the state is Turkish,” this was changed in the Constitution of 1982 into “The state language in Turkish.” This makes the introduction of a language other than Turkish as a language of lessons difficult.

48.5 New Developments

48.5.1 Discussion Points and Development Trends

As in the past, lyceums are not preparing pupils sufficient well to pass university entrance tests. This gap is filled by private providers (*dershaneler*), which are unaffordable for poor sections of the population. They not only coach primary and secondary school pupils; they mainly prepare pupils for university entrance tests. Despite the ongoing criticism of the private coaching providers from parents, government officials, and educationalists, their significance over the last 20 years has risen, not fallen. In 1995/1996, there were 1,496 such facilities with 379,463 pupils and 12,430 teachers; by 2010/2011, their numbers had risen to 4,099 facilities providing services to 1,234,738 pupils through 50,209 teachers (Özođlu 2012). They also provide pupils with the opportunity to prepare for final school examinations. Teachers at these facilities are paid much more than teachers in state schools. It is evident that state education continues to fall below the quality of private education and that university entrance remains a financial burden for families.

Another long-term problem has been the connection between school education, vocational education, and the transition to work. The 8-year primary education does not provide a job-related knowledge or orientation. The subsequent options relating to vocational education at the upper level of secondary education cannot compete with academic education: by far, the majority of young people decide to follow an academic track instead of going to a vocational lyceum or following a program of dual (sandwich) education. With unemployment twice as high in the 15–24 age group compared to the general national average of 9.9 % (September 2013), it is essential to improve vocational education.

Another point of discussion concerns religious education in school. This is determined based on guidelines issued by the central national authority, the Office for Religious Affairs (*Diyanet İşleri Başkanlığı/DİB*), which determines the content of religious instruction for all Muslims in Turkey, Sunni, and Alevi alike.

Even though, from a pedagogical and theological perspective, the new curriculum, which has formed the basis for all mandatory ethics and religious instruction since 2005, may be stronger on contemporary methods, academic awareness, and content than its predecessor, it is still open to criticism. It is argued that it concentrates too strongly on a specific Turkish perspective of Islam, that it takes too little account of other religions, and that it only takes an anecdotal approach to Alevi Islam (Kaymakcan 2007, p. 5). As a result of discussions in working groups at government level examining the Alevi religion in lessons, the MEB decided to take from the beginning of 2011/2012 more account of Alevi in religious education textbooks and include it in learning units at school. Some Alevi associations are nevertheless still critical of the changes, suggesting they do not go far enough. They criticize the fact that lessons are mandatory and not voluntary and that – by reducing Alevism to the figure of Ali (son-in-law and cousin of the Prophet Mohammed and central figure of the Alevi belief) – Alevi is taught in an ahistorical manner. Between 2010 and 2014 many public general lyceums were transformed in Imam-Hatip schools, pupils were automatically enrolled at when they did not choose a particular school. While the number of Anadolu schools and of vocational-technical lyceums increased by 57 % or 23 % respectively, the growth of Imam-Hatip schools was 73 % (ERG 2014), developments that confirmed concerns of a growing islamization of the public school system.

The subject “Citizenship and Human Rights Studies” was first introduced to the curriculum in 2005 (ERG 2007, p. 63); since then, it has been removed and reincluded (ERG 2011, p. 104). The effects of converting primary and middle schools to 8-year single schools of primary education on teacher training, on the professional image of teachers and their specific practice in schools have hardly been studied; this model can only be evaluated retrospectively given the renewed school reform.

By extending compulsory schooling, other educational goals have been set whose implementation is part of the ambitious targets of the current five-year plan. These include abolishing schools in shifts – school group that have lessons that take place either mornings or afternoons – reducing class numbers to 25 pupils, and the nationwide establishment of school bus transport that enables pupils from smaller towns and villages to go to school in larger towns and cities which offer qualitative better opportunities than local “dwarf” schools. In addition to school bussing, existing local schools will be provided with boarding facilities and general education schools with residential homes.

48.5.2 Best Practice Strategies

Cooperation programs between the MEB, industry, and artisan associations have led to training programs being initiated that appear to be promising in setting the direction for necessary change in this area. Thus, with financial support from the EU, a 5-year project was set up in 2002 to develop vocational training in Turkey and a project established to modernize vocational and technical education in the

secondary sector. The aim of the pilot project is to develop modular-based vocational education standards for 64 vocations which would then be deployed in Year 9 of 145 pilot facilities (including 105 vocational lyceums) for 4 years. As part of the project, the first year of the vocational and general education tracks were brought together and set up as an orientation year. Only afterwards were pupils divided into the various types of school and training areas (Türkonfed/ERG 2006, p. 35).

Since the beginning of the twenty-first century, the MEB has announced a number of activities that push ahead reforms of obsolescent teaching methodology and content. These were integrated into the new central curriculum from the beginning of 2004/2005. In the past, lessons were characterized by and large a teacher-centered, front-of-class style of teaching; now, the curricula have been adapted to align with new academic awareness and attention paid to ensure that people are portrayed as individuals with responsible personalities. Instead of learning content by rote, receptive learning is to be replaced by problem-solving learning. Key words here include active learning, critical thinking, pupil-centered learning, conveying learning strategies, and preparing for a knowledge-based society. Instead of a teacher-pupil relationship based on a hierarchically structured interplay of authority and “love,” partnership-like forms of interaction and learning are to be established. Furthermore, there has been a paradigm shift from the usual type of *ex cathedra* teaching to more open forms of instruction and learning, which is revealed in the introduction of class time for “individual and communal activities” in Years 1–3 (introduced 2001–2006) and “guidance and social activities” (2006–2008), the extension of the primary school subject of “social knowledge” into Years 4–7 and in the new teaching materials and the extension of lessons allocated for electives from 12 to 20. The fact that the educational reform of 1997 introduced foreign language teaching from Year 4 makes it clear that Turkey is trying to emulate Western European models of early foreign language learning.

There is a desire for the expansion of research in scholarly monitoring and evaluation of the qualitative and quantitative reforms introduced in the education system at brief intervals.

Success has also been posted with the ambitious goal of connecting all pupils in the country to the Internet. At lyceums, nearly 100 % of pupils have Internet access at school. A program entitled “Mobile Education” aims to ensure that pupils from rural areas that are not so well connected and pupils from schools at which classes are merged for reasons of capacity have the opportunity to receive a better education. These pupils are brought from their place of residence to primary schools with better learning opportunities. Costs arising for transport and meals are borne by the state. However, this program is criticized to contributing to trimming the educational infrastructure in rural areas.

The MEB’s decision to liberalize the use of teaching materials in 2002 was a significant step toward promoting equality of opportunity in education. On top of this is a comprehensive public scholarship program that aims at enabling children from socially disadvantaged sections of the population greater access to educational institutions (ERG 2007, p. 35).

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M. Želudenko (✉) • A. Sabitowa
University of Kiev, Kyiv, Ukraine

49.1 History and Social Parameters of the Education System

In the field of education, Ukraine, like all other countries formerly united under the Warsaw Pact, had to contend with a Soviet legacy that had dominated the education system for over 40 years. Until the breakup of the Soviet Union in 1990, the laws of the USSR and of the Union Republics on national education also applied to Ukraine. In 1991, the country inherited a school system modeled on the Soviet unity school, a system characterized by its demand for uniformity and a centralized organization controlled by Moscow.

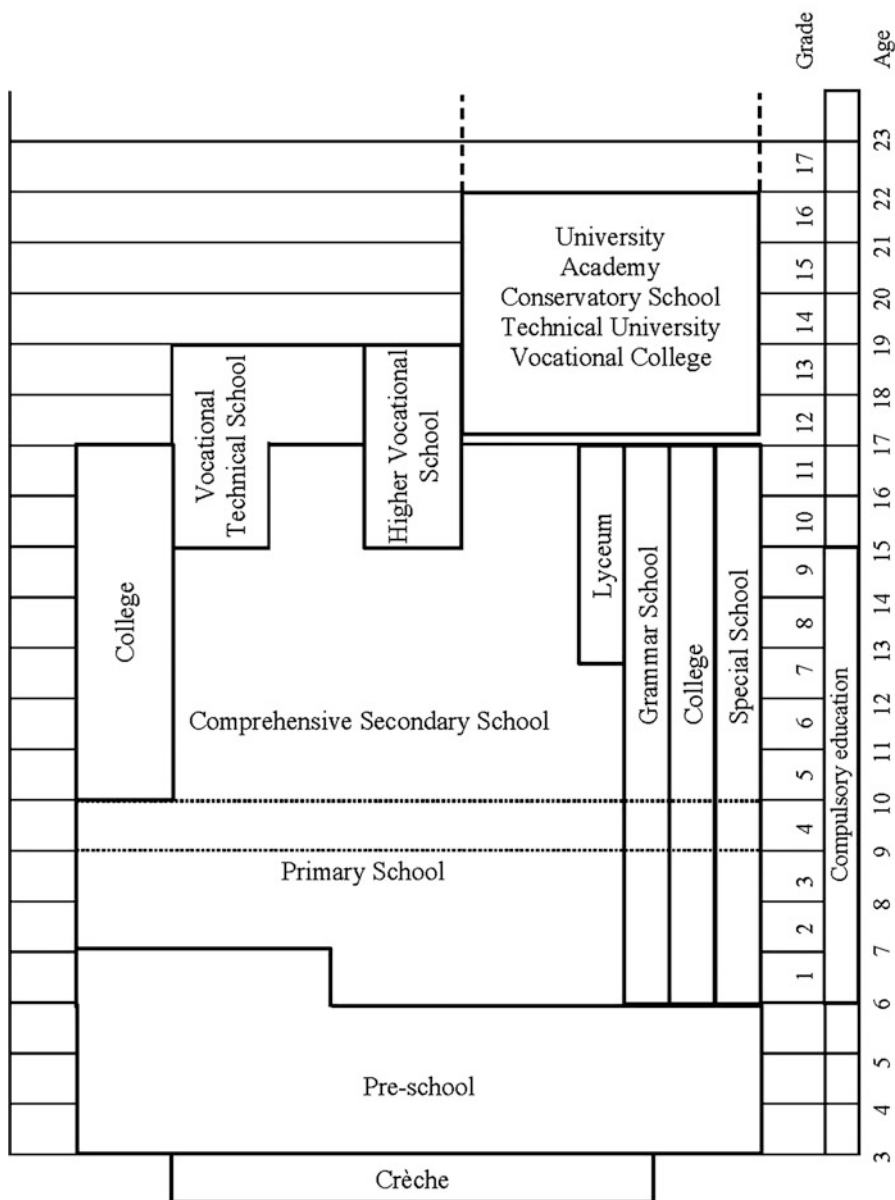
Following the Declaration of Independence of Ukraine on 24 August 1991 by the Supreme Soviet in Kiev, the Declaration of State Sovereignty, which had been formulated a year before, contained a “cultural development” section aimed at the educational domain which stipulated that, from then onwards, Ukraine would act independently on all issues concerning education, sciences, and cultural and intellectual development of the Ukrainian nation and that all nationalities living in the territory of the Republic were granted the right to freely exercise their national culture. The Act on Education of the Ukrainian Socialist Republic, issued in June 1991, laid down the future direction of education and its place in society. The public was not presented with a change of direction in national educational policy until the spring of 1994, when the state education program, passed by the Parliament on 3 November 1993 was made accessible under the title: “Education (*Osvita*) – The Ukraine in the Twenty-first Century.” The program focuses on the three following sets of topics:

- The remodeling of the existing education system, taking into account all of the political, economic, and intellectual changes which have occurred in the independent state of Ukraine
- The creation of a flexible education system, which aims at increasing the education level of the population of the country
- The creation of new types of education facilities, such as “associate institutions” consisting of university and nonuniversity institutions, academies with “profiles,” regional universities, college networks, grammar schools, high schools, etc.

The reorganization of the education system began by breaking up the traditional centralization of the system inherited from the Soviet times by transferring areas of responsibility (funding preschool facilities and schools) to local authorities.

Important reform efforts included joining the Bologna process in May 2005, compiling curricula in line with European standards, introducing uniform selection procedures for universities, extending schooling to 12 years, and the transition to a new structure of secondary education. It was clear that profound reforms to the Ukrainian education system were necessary to achieve European standards. Therefore, primary and higher education would have to be reformed as quickly as possible and – among others – dedicate more attention to computer sciences. The patriotic education of young people should form the backbone of education.

Ukraine



In recent years, the first steps toward a quality assurance system in the Ukraine have been taken; leading, for example, a procedure of state accreditation of general education and nonschool educational facilities has been developed and approved. According to the National Doctrine for the Development of Education, quality in

education and compliance with international standards are to be given political priority when implementing a citizen's right to education. The first congress on monitoring quality in education convened in June 2004. Since then, the national system of external monitoring and the award of marks for school achievement have been developed. The main function of the system is to create a center for awarding marks for final advanced school examinations and having these recognized in university enrollments, to set up other quality assurance systems, to establish nine regional accreditation centers, and to transition gradually to a state final certificate by drawing on external standard tests.

During this transformation period, the level of education in Ukraine has increased. While the last Soviet census in 1989 identified 27.4 % of the population as university graduates, by 2001 was 31.3 % (in rural areas however only 17.7 %). The proportion of Ukrainians who had finished secondary school fell from 66 % in 1989 to 65.1 %. In 2001, 99.9 % of the population was literate. As in the past, there is a huge educational gap between urban and rural areas, a problem that the political actors are well aware of. They are definitely making every effort to create better educational opportunities for rural communities. Without reforms, however, it is no longer possible for many areas to maintain all schools. This is mainly due to the critical demographic situation in the Ukraine: since independence was proclaimed in 1991, the population has fallen by over five million. For 8 years, it has fallen by over 100,000 a year; in the last 4 years, the school population has fallen by 300,000 each year.

Although the social status of the teaching profession is generally quite high – a continuation of a Soviet tradition – the profession has in the meantime become one of the poorest paid in the country. In July 2006, a teacher's average monthly salary amounted to 888.58 hryvnia (roughly 138.50 €). In comparison, an industrial worker's wage stood at 1,233.03 hryvnia (192.25 €), an employee in public administration at 1,704.29 hryvnia (266.50 €), and a worker in the financial sector at 2,091.27 hryvnia (326.07 €). Across all professions, the average monthly salary stood at 1,078.86 hryvnia (168.21 €). The low pay has little to do with the loss of social status but does lead many teachers to leave the profession. Another consequence of the low pay is the extremely high proportion of women in the profession. The bias is less obvious with head teachers; 64.1 % of head teachers are women.

49.2 Fundamentals, Organization, and Governance of the Education System

49.2.1 Education Policies and Aims

Everyone in Ukraine has the right to free general secondary education at all state educational facilities regardless of gender, race, nationality, social and economic background, nature and character of employment, ideology, religion, state of health, and other circumstances. The Ukraine Ministry of Education and Science (*Ministerstwo oswity i nauky Ukrainy*, hereinafter *MON*) in Kiev is responsible for

all levels of educational policy – from preschool to university. The legal framework for the work of MON has been provided since April 2002 by the National Doctrine for the Development of Education which is also responsible for the planning and implementation of education and research policy, including prescribing education priorities, funding, and supervision of all subordinated institutions.

The MON has formulated the following priority goals for the development of the education system:

- To secure equal access to top quality education
- To introduce an independent external assessment of secondary school leavers required to submit an application for university study
- To develop a textbook program that targets the improvement and uniformity of textbook content
- To create new business mechanisms relating to the involvement of the state, its citizens, and the business world in ensuring the same access to top quality education
- To modernize higher education in line with the Bologna process and expand the autonomy of universities
- To increase the competitiveness of Ukrainian research

49.2.2 Legal Foundations of the Education System

The legal foundation for educational policy is captured in the constitution of Ukraine and in the laws *on education, on general secondary education, on pre-school education, on extracurricular education, on vocational training, on higher education, and on the protection of children.*

Paragraphs 10–14 of the Law on Education from 1996 defines the responsibility of state bodies for administrating the education system and its skills and competences. The following bodies are mentioned:

- The Ministry of Education and Science of the Ukraine
- Diverse specialist ministries and authorities
- The state accreditation committee
- The Ministry of Education and Science for the autonomous Republic of Crimea
- Local bodies of the state executive and local administrative bodies and the bodies and departments of educational administration that report to them

49.2.3 Management and Administration

Vocational education is administered at national level by a specially empowered central executive body for vocational education whose functions are currently carried out by the Ministry of Education and Science. This is responsible for organizing the implementation of national policy on vocational education, for

outlining development perspectives, for drafting law, for the state directory of vocational professions, for state vocational education standards, for framework curricula and syllabi, for elaborating other legal issues relating to a functioning vocational education system, and for founding, winding up, licensing, and approving vocational schools/colleges. Alongside this is a coordinating body, the interdisciplinary Council for Vocational Education, to which the deputy minister is assigned as president, the leading heads of various ministries, members of parliament, scientists, and representatives of employer associations. At regional level, there are bodies of education administration. At local level, the vocational schools are administered by the school directors who are employed by the Ministry of Education and Science.

49.2.4 Financing

All the institutions that make up educational administration, with the exception of the State Accreditation Commission, play a role as maintaining bodies for state education institutions. In the context of the requirements of the Ministry of Education and Science, they are, for this reason, responsible for financing each institution and for recognizing its respective charters and statutes. All state educational establishments, institutions, and organizations, as well as industrial operations of the education system, are financed by the treasury, by nationalized operations and organizations, and by supplementary funding sources such as funding from the municipal treasury, donations from enterprises and individuals, proceeds from the sale of the products from workshops, etc.

In accordance with the law, the education budget corresponds to at least 10 % of national income. In 2004, the Ukrainian Ministry of Education and Science stated that only 10 % of schools were equipped with computers and internet access. In terms of audiovisual equipment and scientific instruments, Ukrainian schools can only cover 20 % of their actual requirements. Only about 50 educational facilities have their own websites, and the content of these sites is solely informative and not educational. Even in public spaces (such as internet cafés), the availability of online resources is only satisfactory in the capital Kiev and in few larger cities. There is a significant difference between town and country: in the country where schools are mainly small, where there is not a class in every school year and where classes are often made up of less than ten pupils, the participation of parents and members of the community in school life is particularly important.

Schools that are more community oriented try to have representatives of local authorities in their councils, thus inviting them to take part directly in financial decision-making and in issues of content. A major focus of such schools is the inclusion of parents. Traditionally, these are seen as sponsors (for school repairs, class trips, etc.) but who, beyond this, are not really interested in school life. These schools call directly on parents to take part in school events and to join class trips and to play an active role in the decision-making process within the school.

49.2.5 Relationship Between the Public and Private Sectors

In terms of numbers, private schooling in Ukraine is low key. Of the 22,100 schools in the country in 2004, only 267 were in private hands. However, in comparison to 2001, the number of pupils in private schools (23,700 in 2001) had increased fourfold by 2007–2008. As described in the general decrees on private educational institutions, these institutions are not state owned but have to fulfill state requirements for general secondary education. This means that their leaving certificates are only recognized if the extent and the level of the education that they provide comply with the standards laid down by the state.

49.2.6 Quality Developments

An important element in the development of quality in the education system is in-service teacher training. The structure of training is complex, comprising a national and 26 regional in-service training institutes, a special in-service training facility in Crimea, 19 training faculties at education colleges, and several private in-service training centers. The legal framework for in-service teacher training is provided for by the law on education and the law of higher education. In-service training is coordinated by MON that works closely with the research academies in Ukraine and a network of private facilities for postgraduate education. For Ukrainian teachers, in-service training is mandatory and takes place every 5 years in a 3-month course (144 h) at an institute of postgraduate education (*Institut pisljadypломnoji oswiti*). This is subject based with an examination at the end. In addition, some qualifications can be extended and internships arranged. On top of this, it is also possible to qualify in other subjects or to enroll in a distance-learning program.

The academy for educational sciences founded in 1992 was awarded a new status in 1999 and significantly reviewed its staffing which now includes international researchers. Its main task is to provide methodological and theoretical support in the development of the national education system.

49.3 Overview of the Structure of the Education System

49.3.1 Preprimary Education

Preschool education is not mandatory. It can take place exclusively within the family or in a state, company, private, or other preschool institution. Preprimary education facilities include crèches, kindergartens, family kindergartens, day care centers, education complexes, and special kindergartens for children with psychological/physical disabilities where children are looked after and prepared for school. There is an increasing number of complexes, i.e., preprimary and general education schools on the same site that provide children with a continuous pre-school and general education, thus easing the stress involved in starting school.

In many rural areas where there are no kindergartens, special preschool groups have been set up in general schools for younger children. In 2007, 54 % of all children in preschool age attended a preschool facility. In recent years, the number of children attending preschool facilities has increased by 7 %. Although the state funds state-run preschool facilities (except for meals), all parents are obliged to pay a means-tested contribution.

49.3.2 Schooling

The school system is divided into three levels: Level I (elementary or primary school), Level II (middle school), and Level III (upper school, completing secondary education). Some schools teach only one of these levels, but there are also integrated schools with all three levels and “compound” institutions comprising Level I, Level II, Level III, and a higher education institution. Comprehensive education usually covers 12 years: Level I, the first 4 years of school, Level II, 5 years, from Years 5 to 9, and Level III, 3 years, from Years 10 to 12. There are different types of school:

- Elementary schools in which Level I is taught: about 3,000 in rural areas, some of which offer morning and afternoon education
- Education complexes comprising preschool facilities and general education schools
- General education schools comprising all three levels from Year 1 to Year 12
- Specialized schools in which all three levels are taught with a special focus on selected subjects in Level III
- General education special boarding schools for children with mental and/or physical disabilities
- General education residential schools for children with health issues which function as both school and treatment center comprising all three levels
- Schools for the social rehabilitation of children who need special education conditions
- Evening schools at levels II and III
- Gymnasiums that only include middle and upper school and with special profiles in certain subjects
- Lyceums focusing only on Level III which prepare pupils for subsequent professions
- Colleges also focus only on Level III but concentrate on humanitarian, philosphic, philology, cultural, or aesthetic subjects.

A school year should not last less than 34 weeks at all general education schools, in Year 1 not less than 30 weeks. Holidays should not be less than 30 days per school year. Lessons usually last 35 min in Year 1, 45 min in all other school years. A school year in the primary school covers roughly 600 h. The school week is

usually 5 days; in levels II and III, it can be 6 days if agreed with parents. The maximum number of pupils per class in general education middle schools has been raised from 25 to 35. Exceptions to this apply to specialized schools and specialized classes, gymnasiums, and lyceums in which class numbers should not exceed 20, and special schools and classes in which no more than 15 pupils are permitted. In addition, classes are to be split into two groups for foreign language lessons, in practical and laboratory exercises and in IT.

In Year 1, only oral marks are given in assessment of school achievement. In all subsequent years, achievement is assessed on a scale from 12 to 1, with 12 the best and 1 the worst mark. It is extremely difficult for pupils to receive a “12,” and it is only awarded for exceptional work. Marks are awarded every half year. Only the overall mark for the school year is mandatory and documented in a school report at the end of each school year.

Given the shortage of space, many schools work in two shifts, i.e., some years are taught in the morning, some in the afternoon. In the afternoon, there are often clubs or extra lessons. “Olympiads” are very popular in which pupils pit their talents in various subjects against other schools. First of all, pupils compete against each other within the school, with the best then taking part in city, district, and regional Olympiads.

49.3.3 Primary Education

Schooling is mandatory in Ukraine. Children start school at the age of 6. At the request of parents, children may also start school at the age of 7. The number of children starting school at the age of 6 has been rising each year: in 2002/03, 66 % of all 6 year olds went to school, and by 2004/2005, this had increased to 74.6 %. Nearly 23 % of all school starters attend Year 1 as an extension of kindergarten, usually seen as providing the best conditions for 6 year olds. Before starting school, tests are carried out to assess the child’s maturity for school. This often is conducted with the help of a school psychologist. The decision to accept a child or not is made jointly by the teachers and the school psychologist. This is mainly the case for primary schools at gymnasiums and lyceums.

If a child cannot attend school, especially in the case of illness, for example, the school will arrange private lessons. In 2004–2005, over 8,000 pupils took advantage of this facility. This right to private lessons also applies to gifted pupils who are capable of completing learning programs much quicker, to pupils in rural areas when there are fewer than five children of the same age in the village, and to children with psychological/learning difficulties if their parents refuse to send the child to the appropriate general education special school. For pupils in Level, some schools offer “extended day groups” – a kind of after-school care center – in which overall 11,000 children are looked after with costs covered by the state and just 545 children whose parents cover the costs. The number of children attending these groups has risen to 32,000 in recent years.

Table 49.1 Standard curriculum of a full-day school taught in Ukrainian

Subjects		Hours weekly in Years 5–9					Total
		5	6	7	8	9	
Mandatory subjects							
1	Ukrainian	5	4	4	3	2	18
2	Ukrainian literature	2	2	2	3	3	12
3	World literature	2	2	2	2	2	10
4	Foreign language	4	3	3	3	2.5	15.5
5	Mathematics, IT	4.5	4.5	4.5	4.5	4.5	22.5
6	Ukrainian history	1		1	2	2	6
7	World history		2	1	1	1	5
8	Law					1.5	1.5
9	Geography		2	2	2	2	8
10	Environment and nature	1					1
11	Biology		2	2	2	2	8
12	Physics			2	2	3	7
13	Chemistry				2	2	4
14	Music, art	2	2	2	1		7
15	Sport	2	2	2	2	2	10
16	Working studies	2	2	2	2	2	10
17	Health	0.5	0.5	0.5	0.5	0.5	2.5
Total		26	28	30	32	32	
Options							
Elective (additional)		4	5	5	5	5	24
Envisaged (permitted) number of lessons per week		29	32	33	34	35	
Total		30	33	35	37	37	172

49.3.4 Upper and Lower Secondary Education

Lower secondary education comprises Years 5–9 at general education schools. In line with the latest legislation, the upper level of secondary education comprises Years 10–12.

The timetable at general education middle schools consists of blocks of subjects that are compulsory at general education schools as well as electives/optional courses. A remarkable broadening of the field of language and literature has taken place, which alongside teaching in Ukrainian language and literature leaves plenty of room for various foreign languages and the subject of “international literature,” as well as teaching in national (ethnic) languages. History has been divided and expanded to include “Ukrainian history” and “world history” each covering 3 % of the total number of hours taught. If parents, pupils, and an interested enterprise so wish, the latter offering above all the possibilities of practical instruction, school workshop instruction can take the form of fundamental vocational training, provided the school council approves and the necessary requirements are fulfilled (Table 49.1).

The admission of pupils to Level III is generally by means of a competition, whose conditions are elaborated by each school and are approved by the relevant authorities of the state educational administration. The admission requirement is in any case successful completion of Year 9. About 40 % of 15 to 17 year olds receive instruction at upper secondary level. One or more profiles (in humanities, mathematics and physics, technology, economics, etc.) can be introduced in all schools at Level III in accordance with the wishes of parents and pupils and if the requirements are met by the school.

49.3.5 Grammar Schools, Lyceums, and Other Schools with a Selective Character

According to the definition provided by the Ministry of Education and Science, grammar schools (gymnasiums) are comprehensive secondary education institutions of the lower and upper secondary level which provide scientific and theoretical as well as general cultural education for talented children and adolescents. They cover Years 5–12. The lyceum is a special educational institution, also for talented children, which provides a general education, including scientific and practical aspects that go beyond the requirements laid down by the Ministry of Education and Science. In the corresponding decrees of the Ministry of Education and Science, the lyceum is described as an institution of the upper secondary level. As a rule, lyceums do not provide instruction at lower secondary level. However, the lyceum can start in Year 8, thereby covering a part of the lower secondary level. Transfer to both school types is dependent upon passing an entrance examination.

From Year 8 onwards, the basic timetable of the grammar school is divided into three subject areas: humanities, natural sciences, and fine arts and artistic work. On the whole, there is a recognizable tendency toward a stronger classical humanities orientation as a result of the introduction of subjects such as Latin, rhetoric, and logic. At grammar schools, no vocational education takes place. Only a vocational orientation to the state standard in the context of the subject area of technology is provided. The basic timetable of the lyceum is conceived along the following lines. It is comprised of six basic profiles: philological, historic-cultural, arts and humanities, mathematics and physics, biology and chemistry, and technology. No vocational education takes place at the lyceum, but a vocational orientation and specialization with a view to the future choice of profession can be undertaken.

In addition to the lyceums and grammar schools, there are the “specialized schools” and colleges, which represent two further school types that serve to promote talented children. The “specialized schools,” which already existed in Soviet times, differ from the comprehensive school in that they build a profile in single subjects, for example, in mathematics, sports, or music, in which in-depth instruction over a significantly greater number of hours is imparted from Year 1. The colleges are general education schools which cover Years 5–12. Only in exceptional cases do they offer instruction from Year 1. They provide an education

that exceeds the standards set by the state with a profile in humanities, humanities and social sciences, or humanities and natural sciences.

49.3.6 Vocational Education

Vocational education encompasses a broad spectrum of learning and teaching forms at educational institutions of the secondary, post secondary, and tertiary sectors and in operations and business. In all state vocational education institutions, pupils receive a fundamental vocational education which fulfills the basic right of citizens to free education. The schools of the upper secondary level specializing in various subjects provide basic vocational education, as do vocational technical schools, PTUs (*profesijno-tehnične učilišče*), vocational artistic teaching institutions, teaching institutions for social rehabilitation, teaching institutions of agricultural and industrial enterprises, etc. Since 1996, a number of fundamental laws have been passed concerning educational reform. Details relating to vocational education are found in the Law on Vocational Education of 1998 and the Law on Incremental Vocational Education of 1999 which were followed by other laws. More laws are envisaged.

The vocational education system provides different professional qualifications at three different levels. Level I lasts from 1 week to 6 months and provides lower qualifications in different occupational areas. Pupils can enter the second level of vocational education either after completing the upper level of secondary education (after Year 12) or after the lower level of secondary education (Year 9). Pupils entering from the lower secondary level who also take courses at upper general secondary level in addition receive an upper secondary school leaving certificate. Exemptions also apply to pupils who have not completed lower level of secondary education, enabling them access to vocational education in selected professions. Level II lasts up to 3 years and can also be provided by institutions running continued training and retraining programs. Level III of vocational education is at the equivalent level of higher education. At the end of each level, a qualification is awarded that enables learners to enter the labor market and continue their learning. Qualifications satisfy entrance requirements for salary brackets. Vocational education also plays a key social role in providing support for the disadvantaged.

49.3.7 Higher Education

To study at a university, students need to have completed general secondary or technical secondary school. Ukraine has 920 institutes of higher education representing various accreditation levels and forms of organization: 184 universities, 58 academies, 125 institutes, 2 conservatories, 199 colleges, 210 technical universities, and 143 vocational colleges (as per 2006–2007). The various higher education institutes are not equivalent in nature but are divided into various levels

of accreditation. This accreditation is based on official recognition of the right of the institute to exercise its respective teaching activities. There are four levels: Levels I and II include all vocational and technical facilities at nonuniversity level; Level III includes institutions that do not conduct their own research programs and cannot award doctorates but still offer university level programs; and Level IV includes all universities, conservatories, academies, and some institutes. They can also award doctorates and conduct independent research. A recent reorganization of higher education Levels I–II in structural units of accreditation Levels III–IV led to a reduction in the overall number of higher education facilities from 966 (2004–2005) to 920 (2006–2007).

Besides state-run higher education facilities, there are approximately 200 private institutions across all four accreditation levels. Only very few however are state recognized and are authorized to award degrees.

In 2006–2007, there were 2.8 million students, 1.6 million of which were enrolled in day courses. Roughly 2.3 million students were enrolled at universities, academies, and institutes and nearly 500,000 at colleges, technical universities, and vocational colleges. Compared to the previous academic year, the number of students rose by 77,400. The number of international students at institutes of higher education has been rising from year to year and in 2006–2007 amounted to 36,600 from 131 countries.

The majority of universities are under the supervision of the Ministry of Education and Science. The range of programs has expanded significantly since 1990; since 2007, bachelor degrees have been offered in 48 faculties and 141 subjects.

49.3.8 Degrees

Bachelor, specialist, and master degrees correspond very much to degrees awarded under the Soviet system. Since 2005, Ukraine has been a member of the Bologna process. In order to meet the key requirements of the Bologna agreement, Ukraine has to create comparable degrees measured by performance. These include the following.

The first degree is the bachelor degree (*Bakalavr*, BA, BEd., BMed.), which can be achieved after 4 years (medicine after 5 years). The bachelor degree recognizes the completion of a fundamental university course and is also a professional qualification. The specialist degree (*Dyplom Spetsialista*) is awarded after 5–6 years' study, depending on the respective university. The postgraduate master's degree (*Dyplom Magistra*) can be obtained after a further study of up to 2 years. A final examination and a viva voce are compulsory components of the award. The third level of academic qualifications is the so-called "candidate of knowledge" (*Kandydat nauk*) which corresponds to the international PhD degree. This can take between 3 and 4 years to complete. Besides the publication of a thesis, doctoral programs have to include a final examination and an oral examination called a *rigorosum*. Doctoral programs are quite widespread. A postdoctoral program

“doctor of knowledge” (*Doctor nauk*) is the fourth and highest level of academic achievement in Ukraine. The number of PhD students rose continuously between 2003–2004 and 2007–2008 from 27,106 to 32,500, with the number of postdoctoral students rising from 1,220 to 1,418 in the same period.

49.3.9 Continuing Education

Continuing education is a major issue both for the employed and the unemployed. The knowledge and skills of many workers no longer meet the requirements of modern commercial technologies, and as a result of the tense economic situation, unemployment is high. Labor law to be introduced will place responsibility for the continued education of workers more firmly in the hands of employers. The unemployed are to receive training based on a modular system. Most educational facilities provide continuing education programs. In 2002, the first continuing education courses kicked off based on framework curricula for 59 professions.

49.4 Developments in the Current School System

The Ukrainian school system is facing a whole range of specific development problems.

49.4.1 Quality Assurance Measures

The Law on General Secondary Education introduced uniform national tests. This system of independent external tests aims at guaranteeing quality in education and preparing accurate and comparable information on the level of education in schools. Apart from the numerous benefits of the new test system (countering corruption in higher education, providing uniform criteria for quality in the knowledge and skills of school leavers), it has also given rise to a number of questions from the school leavers themselves, from their parents, from politicians, from teachers, and from lecturers.

The Ministry of Education and Science has already determined the details of the final tests for Years 9–11. Pupils in Year 9 take tests in the following subjects: Ukrainian, world literature in an integrated course in literature, foreign language, history of Ukraine, world history, fundamentals of law, biology, geography, and physics. At the end of Year 11, pupils face questions in the following subjects: Ukrainian literature, world literature, foreign language, twentieth-century history of Ukraine in an integrated course in literature, world history, health, people, environment and society, IT, geography, biology, business administration, chemistry, and physics. Tests are controlled and pupils graded by a parliamentary committee (*Verchowna Rada*) for science and education.

49.4.2 The Ukrainian Language in Schools

Although Ukrainian has been the sole official language in Ukraine in 1991, the constitution of 1996 does uphold the rights of ethnic minorities in terms of language and education. By and large, this affects Russians, the largest minority living in Ukraine. Article 10 (3) of the Ukrainian constitutions states: *“In the Ukraine, the free development, use and protection of Russian, and other languages of national minorities of Ukraine, is guaranteed.”* And Article 53 (5) states: *“Citizens who belong to national minorities are guaranteed in accordance with the law the right to receive instruction in their native language, or to study their native language in state and communal educational establishments and through national cultural societies.”* In the last few years, Russian is not as widespread as it once was, but this had led to be a significant division in the country. In 2005–2006, Russian was the language instruction at 93 % of schools in Crimea, 71 % of schools in Donetsk, and 66 % of schools in Luhansk. At the same time, Ukrainian was the language of instruction at 99 % of schools in Rivne, 99.8 % of schools in Ternopil, 99.7 % of schools in Volyn and Ivano-Frankivsk, and 96 % of schools in Kiev. However, more important than the statistical data is the legal right of parents to be able to demand that a Russian class be set up in schools as soon as eight to ten parents so wish for their children. In addition, Russian is still offered as the language of instruction in all secondary schools in the Ukraine. Alongside Russian-language schools and classes, there are other facilities for other ethnic minorities in Ukraine: there are lessons at 64 schools in Hungarian, at 94 schools in Romanian, at nine schools in Moldovan, at 13 schools in Crimean Tatarian, and at four schools in Polish. In addition, children in the corresponding residential areas can attend mother tongue lessons. There are over 200 various textbooks in minority languages as well as departments at in-service training facilities for lessons in languages other than Ukrainian. Curricula for primary schools taught in the language of the national minorities envisage that the native tongue is taught from Year 1 and an oral course in Ukrainian has been introduced. In primary schools taught in Ukrainian, it is possible to learn a language of the national minorities from Year 2.

49.4.3 Europe in Lessons

The process of shedding its Soviet legacy and welcoming European discussions and institutions is proving particularly complicated for Ukraine in the light of the prevailing current economic problems and the lingering difficulties in creating an identity for a nation with territorial, ethnic, and linguistic issues. Both problems are negatively impacting the education system and everyday life in Ukrainian schools. Despite these difficulties, the country has continued to follow the path it started on in the 1990s toward decentralization and opening the land up to Europe.

There are various projects that take a look at Europe, its institutions, and values in lessons and where the focus is on “learning about democracy on the basis of

Europe.” A good example of this is European Studies: the history of the introduction of European Studies at Ukrainian schools started in October 2002 when a resolution to develop an appropriate course was passed at an international conference. As a result, in collaboration with the Ministry of Education and Science, it was agreed to start a program for pupils in Years 8–12 with 34 h per year allocated for it in the curricula. On top of this, pilot schools were selected, and broad political support gathered for the project. A PR campaign for the project helped secure social acceptance for the idea. At the same time nationwide competitions were held involving embassies, international donors, universities, teachers, pupils, and parents in the discussion process on the project. In 2003–2004, a manual for pupils and methodological recommendation for teachers was compiled to accompany the European Studies program. The driving force behind the project was the Kiev Agreement of head teachers. This also formed the basis for establishing an information center for European Studies. This provided information for teachers on its website, provided educational advice, coordinated a national network of pilot schools, and developed instruments to evaluate the effectiveness of the courses. Since summer 2004, 15 schools in Kiev and 20 other schools in various regions of the country are piloting the course. On the whole, the modular form of the course has been praised, allowing teachers of a variety of subjects (history, geography, social sciences, people and the environment, foreign languages, and economics) to use the material separately and to integrate it in the program of mandatory subjects.

European Studies ties in to the Euroclubs set up at a number of schools in Ukraine since 1995. These are part of an international network of Euroclubs and are seen as centers of European education at schools. They have been set up by teachers and pupils and focus on various aspects depending on their profile. There are numerous examples of well-functioning Euroclubs at Ukrainian schools. They promote a sense of international openness through intense learning in projects, their focus on European issues encouraging active learning about democracy. In addition, Euroclubs and the European Studies program provide a sound domestic and international network for Ukrainian schools – a good starting point for facilitating interest in other international contacts.

49.5 New Developments

The issue of equal access to education and the utilization of educational opportunity have become more topical since Ukraine’s independence.

Private schools in Ukraine are mainly schools newly established from the end of the 1990s, primarily in larger cities. Most of them are grammar schools or lyceums, i.e., prestigious elite schools. These are viewed somewhat critically not least because they are much better equipped – in terms of technology and staffing – than state schools while only very few people can actually afford to send their children there.

According to a recent draft bill, churches will also be able to establish and maintain educational facilities. The church is one of the institutions in society that

devotes itself to morality and spiritual development, and it is therefore important for it to be able to realize its potential – not only in the sector of education. At present there are 33 confessions and directions in Ukraine. To date, it is not clear whether they are willing to establish and materially support educational facilities – based on what criteria? Of course the church cannot solve these problems without support from the state. Regardless of the difficulties, Ukraine will – sooner or later – fully recognize non-state-run educational facilities.

As early as the 1990s, there has been lively interest in European and global discussions in Ukraine, and the country has been generally open for international cooperation and exchange.

The Ministry of Education and Science has a department for international collaboration and European integration which also comprises a special team administering cooperation projects with international organizations and programs. In 2003, the Ministry maintained ongoing cooperation agreements in the field of research alone with 25 countries. Ukraine is integrated in the EU's TACIS (Technical Assistance to the Commonwealth of Independent States) program, the INTAS (International Association for the Promotion of Cooperation with Scientists from the New Independent States (NIS of the Former Soviet Union)) educational program and is integrated directly in Copernicus and indirectly in the EU Youth Programme.

This pro-European policy has weighted consequences for the education system and the democratization of schools and instruction. As a full member of the Council of Europe, Ukraine is integrated in European initiatives in the democracy. In 2005, there was a series of national activities as part of the European year of Education for Democratic Citizenship. In addition, the Ukrainian government is intending to adopt EU education approaches and criteria for quality assurance to enable the country to take part in international comparative studies. On top of this, the Partnership and Cooperation Agreement between Ukraine and the EU, in force since 1998, has resulted in a number of programs being concluded providing the Ukraine with technical support in its transformation process. The Education for Democracy project (2000–2002) even triggered trans-Atlantic cooperation. At present, an EU project sponsored from the Europe Aid program is running to develop civic education.

Learning projects at Ukrainian schools often explicitly target the promotion of key democratic skills in pupils, social and communication skills, willingness to become engaged, awareness for responsibility, and skills to implement goals. Discussion among teachers and educationalists in the Ukraine on the role of learning in projects in schools often sees this as a dedicated “technology” in the education and learning process in schools. A closer look reveals that this is also an aspect of democratic learning and living. In a paper on the role of projects in schools written by the director of the humanities lyceum at the Shevchenko University in Kiev, joint projects would help pupils to expand their view of the world, to learn to work in teams, and to practice tolerance and determination. She suggests that the most important element in “project technology” at the lyceum is not the project itself but the process of working in a project: exploring problem

situations and together developing best possible solutions. Projects often provide international exchange a framework to start with or make it possible to establish international contact in the first place. For many pupils, such international opportunities are a key stimulus to become involved in school projects beyond the time spent in class.

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N. Harris (✉)
 School of Law, University of Manchester, Manchester, UK

S. Gorard
 School of Education, Durham University, Durham, UK

In this chapter, we present an overview and discussion of the key policies, trends, and issues in UK education. The focus in the initial sections is more on the school system of early and compulsory education. Later sections focus also on post-compulsory and higher education and links to the world of work. There are four home countries in the UK – England, Northern Ireland, Scotland, and Wales – with increasingly divergent education systems. Where possible and relevant, we distinguish these systems, especially at the start of the chapter. However, it is not possible within space constraints to provide detailed discussion of the distinctive legislative framework in *each* home country, and for the purpose of this chapter, we have focused primarily on England, which is the most populous of the home countries.

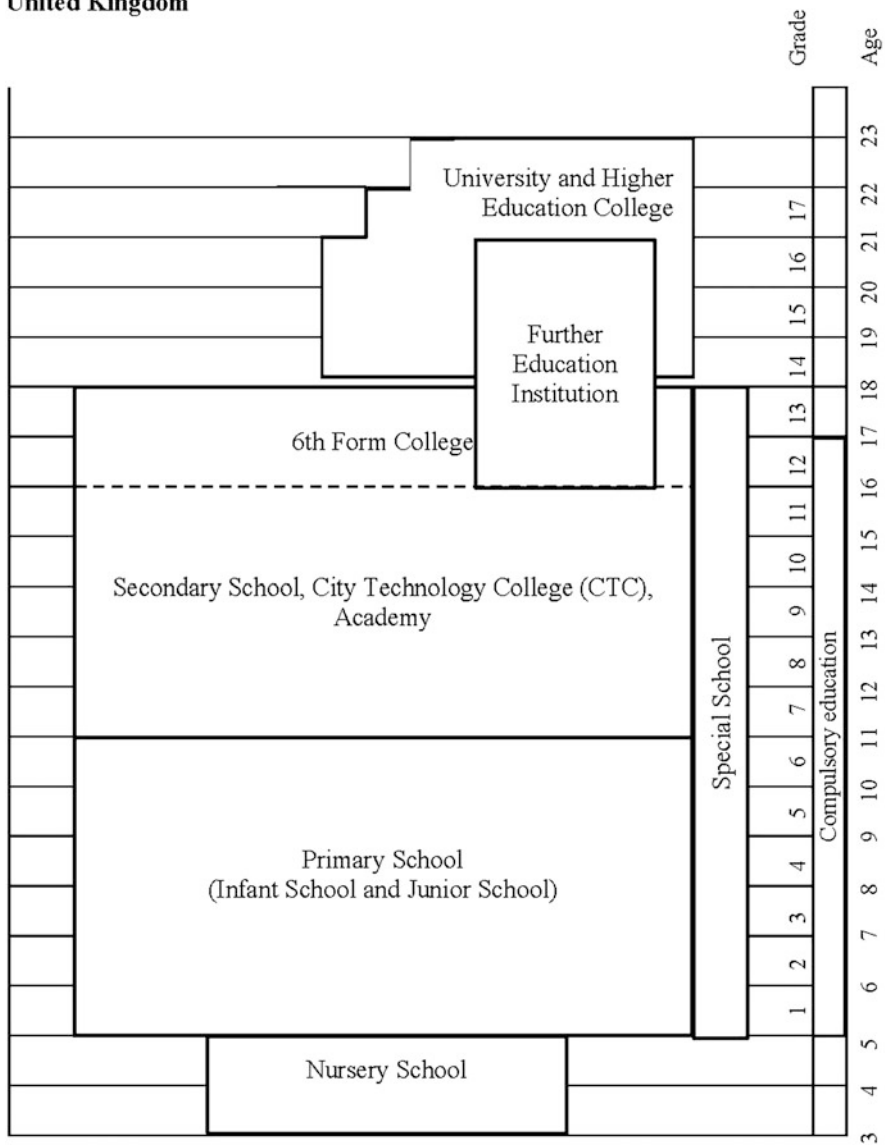
50.1 History and Social Parameters of the Education System

50.1.1 Cornerstones of the Present Structure

In the UK, Acts of Parliament relating to education are increasingly regular, with perhaps increasingly diminishing impact. Looking back over the past 70 years or more, however, two such Acts and a further ongoing process perhaps stand out in their legacy of impact on the present structure of schooling. These are the increasing devolution of policy in the four constituent parts of the UK, the 1944 Education Act, and the 1988 Education Reform Act. By 1900 free elementary education was (near) universal in the UK. In 1944, secondary provision was less homogeneous, and the vast majority of children left formal education at or before the age of 14. The Education Act tried to change that, but it also did much more. It was part of a total reform of the welfare state and included wider measures such as free transport to school, free medical examinations for all children at school, and free milk at break times. Local authorities, via their schools, were required to attend to the spiritual, moral, mental, and physical development of their charges. This meant, in addition to the provision of milk and hot meals, the inclusion in schools of physical and religious education and a daily act of “collective worship.”

Local authorities had to ensure the provision of “appropriate” education for all children up to the age of 15, which meant a rapid growth in the size and number of schools. The Act did not specify what type of secondary schools should be provided, but the government at the time made clear that they expected at least three types of schools. Technical schools were, as their name implies, intended to provide a largely nonacademic, craft and trade preparation education. Very few of these emerged or lasted, and so the system actually became mostly bipartite. Grammar schools were intended for the most academically able (regardless of social origin). Admission was via an examination at the end of primary education – the 11+ – designed to pass around 10–15 % of each cohort. In fact, considerable variation ensued. Adjustment was made for the sexes, so that girls did not “swamp” the grammar schools. In rural areas some “grammar” schools took 40–50 % of the cohort because there were not enough local pupils to maintain the five or more schools needed for a 20:80 split, or schools simply adapted to different

United Kingdom



tracks for pupils deemed of different abilities. “Secondary-modern” schools were intended for the bulk of pupils, who were not considered likely to continue in education past the age of 15 and so were given a mixed academic, general, and vocational curriculum.

Much of the earlier Victorian development of both primary and secondary schooling in the UK was pioneered by charitable, missionary, and religious foundations. This was recognized in the post-1944 settlement by allowing schools to retain their faith-based origins (Church of England, Wales, or Scotland; Roman Catholic; and Jewish). Pupils with clear additional needs were labeled “non-educable” and generally taught in separate special schools and hospitals. In addition, there has always been a small but thriving private fee-paying sector of “independent” schools. This means that there has long been considerable diversity in and between the school systems of the four home countries of the UK. And the 1944 Education Act made explicit provision for parental choice in the allocation of school places (Gorard et al. 2003). In general, parents could choose fee-paying or state-funded provision (mostly dependent on income), technical or secondary-modern (where the former existed), and whether to allow their child to sit the 11+ (many did not), and they could stipulate a religious requirement (again dependent upon local availability). Since the Act specified education but not schools, parents could also choose to educate their children “otherwise,” in practice mostly at home as long as they could demonstrate the child would still receive a broad and balanced education.

Raising the school-leaving age to 15 was a big step, but even so further continuation in formal education remained rare. Pupils left school for work, often without further or on-the-job training. Some became apprentices. Further and higher education was largely the preserve of children from professional and nonmanual occupation families. For example, in 1940 around 8 % of nonmanual origin pupils attended university as undergraduates compared to 2 % of manual and unskilled origin (perhaps 3 % of the age cohort overall). However, numbers increased rapidly after the 1944 Act. By 1960, over 9 % of the age cohort attended university – 27 % nonmanual and 4 % other (Gorard et al. 2007).

50.1.2 Reform and Innovation Over the Past 30 Years

The last 30 years have been a case of “robbing Peter to pay Paul” – as more funding and attention was channeled into schools, early years provision, and eventually further and higher education. Funding and attention moved away from community adult learning, libraries, liberal evening classes, and even political and workers’ education. It is only a slight exaggeration to say that if it did not lead to certification of the kind that could drive up international league table positions, then it was not considered real learning and not funded by government. In a period when ICT began to allow development of earlier innovations such as the Open University (based on radio and television broadcasts), and made informal learning at home or drop-in centers a reality for many, it is ironic that respect for autodidacts tended to decline (Gorard and Rees 2002). Most local authority adult provision is now about how to use ICT itself, but the “silver surfers” who emerge often have little idea what they would use ICT for (Selwyn et al. 2006).

From the 1960s onwards, local authorities converted most secondary schools into comprehensives, which are all-ability schools mixing the intakes previously

sent to grammar and secondary-modern schools. The community comprehensive remains the underlying model for most secondary schools in the UK today. Scotland and Wales moved more quickly to comprehensive intakes, perhaps for political and geographical reasons. A minority of authorities retains selection for grammar schools in England, and the system is still moving towards comprehensivization in Northern Ireland, where selection (and considerable religious segregation) was retained throughout the twentieth century. With these changes came pressure to provide courses and qualifications appropriate for all. Whereas in 1960, less than 20 % of the school intake took General Certificate of Education O (ordinary) level qualifications, by 1990 more than 80 % in England and Wales took at least one General Certificate of Secondary Education (GCSE) qualification, created in 1986 by combining the preexisting GCE for the most able with the Certificate of Secondary Education (and variants) for those considered less able. This equalizing measure was intended to allow pupils to portray what they knew, rather than making teachers judge beforehand whether to enter them or not. GCSE (or equivalent) scores in all home countries are higher year on year and more evenly distributed over time by social group such as class, ethnicity, and sex (Gorard 2000). GCSEs are intended to be taken by pupils at the end of the year in which they were aged 15 at the start, and this was made possible by the successful raising of the compulsory school-leaving age from 15 to 16 in 1972. In England and Wales, students might continue to the study of A or Advanced Levels (or AS levels) in years 12 and 13 (known as “sixth form”). In Scotland, the 15-year-old examination is called Standard Grade, and sixth formers can study intermediate, higher, or higher advanced grades.

The 1988 Education Reform Act was probably the most influential piece of relevant legislation since 1944 (certainly for England and Wales). It established or promoted a wide array of changes that are now taken for granted. It created a national curriculum where none existed before, defining a minimum educational entitlement for all compulsory age pupils, in terms of a specified but flexible “broad and balanced curriculum.” The curriculum was divided into four key stages, from age 5–7, 7–11, 11–14 to 14–16. There is now also a foundation stage for ages 3–5. Each of the key stages ended with assessments (SATs) by teacher or written tests, and the levels expected to be attained were prespecified by criterion referencing (which had by now purportedly replaced the statistical norm-referencing of the O level era). Key stage 4 ended with GCSE examinations (or increasingly with newer alternative qualifications; see below). Standards of teaching and learning were to be maintained by a reorganized school inspection system (under the auspices of OFSTED in England), able to identify, label, and eventually close poorly “performing” schools.

Schools were given greater independence from local authority control (“Local Management of Schools”), specifically in relation to their budget. Schools were allowed to opt out of authority control completely (becoming grant-maintained), and a new form of independent state-funded school was created (city technology colleges). Another form of diversity comes from growth in popularity of own-language education in Scotland and particularly Wales (the successful

Ysgolion Cymraeg). The rights of parents to express a preference for their child's school were extended, and subsequent case law decided that they could request a place in any school they wanted (even outside their authority) and that a place must be given if available. In this way it was, perhaps, imagined that local authorities would wither away to nothing (or merely have charge of peripatetic music staff and similar services), parents would face a greater diversity of schools, and as a consequence of these choices successful schools would thrive while unsuccessful ones would improve or close.

In fact, very little has changed. "Successful" schools are, almost by definition, oversubscribed, and preference is usually given to the nearest families, who in schools located in or near affluent areas are often those able to afford to live there. Parents, in the main, do not want different schools, they seek better ones, and so choice is not linked to diversity. After about 6 years of increasingly socially mixed intakes (in general, middle-class families already lived closest to "good" schools, so it was poorer families who gained most from freedom of choice in the short term), the situation leveled off (Gorard et al. 2003). In terms of equity perhaps one lasting benefit of the 1988 Act has been for pupils having to move between schools and areas, who will have found the standardization of the national curriculum and key stages comforting (even though their teachers may have found it restrictive). In that sense at least, it no longer mattered so much *where* a pupil went to school. This is part of the continuing comprehensivization of the process of education, laid on top of the preexisting structure of comprehensive schools, as intended by the minimum entitlement.

As part of the increasingly public inspection regime for schools, test and examination results were made public after the 1988 Act. These were rapidly given the misnomer of school "league tables" because of the way the results were presented in the press (from highest scoring schools downwards). These were, at least partly, intended to help parents choose good schools, so encouraging such schools with more funds and bad schools to improve to get funds (or be closed). In fact, these tables and scores generally told parents little that was not already known locally, because the scores are largely determined by the intake to schools, not the schools themselves. Grammar schools, selecting their intake by ability via the 11+, were inevitably near the top of all tables, for example. In response, the home countries reacted differently. England is attempting to create increasingly sophisticated (and so undemocratic) league tables which take the school intake into account via techniques such as contextualized value-added analysis. This does not work, and the relevant government department (for children, schools, and families) threatens one group of schools with closure for low scores (raw scores) while at the same time rewarding others for their value-added scores (Gorard 2006). Confusingly, around one-third of the schools in the first group are also in the second. The other home countries, led by Wales and Scotland, adopted the simpler (but also perhaps undemocratic) path of amending legislation so that the national figures are not made public.

The Further and Higher Education Act 1992 (separately for England, Scotland, and Wales) brought all sixth form and further education colleges into one

independent sector, funded by the Further Education Funding Council – now the Learning and Skills Council. Similarly, all higher education institutions became part of one body in each home country, funded by the Higher Education Funding Councils for England/Scotland/Wales. Those that had been universities before the Act are now sometimes referred to as “pre-92” institutions. The other higher education colleges and polytechnics are now also all universities (sometimes known as “post-92” bodies). This has effectively doubled the number of universities. In 1992, around 28 % of young people went on to HE, 40 % from nonmanual backgrounds and 14 % other. Now, around 40 % or more of each cohort go to HE, 50 % of those with nonmanual backgrounds and around 22 % other. The easiest way to widen participation to universities is to provide more (places at) universities (Gorard et al. 2007).

The last stop in this necessarily brief and selective tour of 30 years of reform concerns curricular reform, such as the new Curriculum for Excellence in Scotland, the Welsh Baccalaureate, and the 14–19 Reforms in England. In one sense these quite radical changes to the “national” curriculum for the late secondary phase are an admission of defeat. The social class stratification of educational participation and outcomes has outlasted the onset of universal secondary education, the raising of the school-leaving age, the decline of grammar schools, the introduction of the national curriculum, and the establishment of (some) parental choice and national inspections, among other things. The 14–19 Reforms for England in 2008 (see Sect. 50.3 below), for example, suggest that the traditional liberal curriculum is not suitable for all and begin to provide high-level vocational courses (diplomas) intended to have at least parity of esteem with GCSE and A levels. These diplomas are required to be delivered in cooperative partnerships, creating a tension with policies such as league tables that are competitive and institution-specific. The reforms raise the participation age to 17 (in school, college, or training), creating one of the longest compulsory educations in Europe, with most pupils now attending formal educational establishments from age 3 to 17 as a minimum. And they move away from, at least theoretically, universal national comprehensive provision within schools and colleges towards “personalized” learning and greater student autonomy.

50.1.3 Geographical, Political, Economic, and Cultural Context

There is a UK Parliament in London (Westminster) which deals with UK issues and, confusingly, also with England. The civil service departments associated most closely with the Westminster Parliament, such as the Department for Children, Families and Schools, actually deal only with England (for the most part). There is a legislative Parliament for Scotland in Edinburgh, which currently has no tax-raising power but is responsible for the completely separate school system. There are representative Assemblies for Wales and Northern Ireland (in Cardiff and Belfast) with more limited powers than the Scottish Parliament and which retain some (diminishing) links with the civil service in England. However, both Assemblies

are responsible for expenditure and so policy on schools. Given the remaining similarities in the history and populations of the home countries, the imperfect and ongoing process of devolution has provided opportunities for natural experiments on the impact of policy changes. Higher education is also funded by the home countries, although the tax to pay for it is collected by a UK-wide body and the process of student application and acceptance is still largely handled as a UK-wide process (by UCAS).

The UK has one of the highest population densities in Europe, but this overall figure masks considerable variation between the home countries, the areas around the four capitals of London, Belfast, Edinburgh, and Cardiff, other major cities, and mountainous areas, rural farmland, and the national parks. Sometimes the topography makes access to public services difficult even in less remote areas, such as where a river separates a city or mountains separate adjacent valleys. The remote areas are where the use of information and communications technology (cable television, wireless networks, mobile phones, and so on) could be most effective in helping communities maintain access to education. But these areas are also precisely where the technologies have poorest coverage and which are playing catch-up with innovations (Selwyn et al. 2006).

The UK population has long been in a state of flux with considerable out-migration more than matched by in-migration. The origins of immigrants change over time with economic and other factors in play (Caribbean labor, expelled Asians from Africa, Eastern Europeans as economic migrants, increasing numbers of nonreturning students from Pacific Rim countries, and so on). Their immediate destinations also vary over time, with mode of transport and where there are already areas of similarity. Authorities near ports, airports, asylum centers, and cities like Bradford deal with relatively large numbers locally (even though the numbers overall may not be large). This has short-term implications for school resourcing, especially of non-English speakers. Over time and generations, individuals and families from these areas tend to move out across the UK but are often replaced by new arrivals. The historical and economic conditions of different groups arriving are at least part of the explanation for the apparent under- or overachievement of some minority ethnic groups in the UK. The groups were from different educational and occupational backgrounds on arrival, and some of these differences may take a few generations to disappear.

Social class remains the key variable associated with educational participation and opportunity in the UK, as assessed by parental occupation and education. There is considerable reproduction of status and education within families, and a vigorous debate is ongoing about whether this reproduction is decreasing, increasing, or staying still (Gorard 2008). To some extent the picture of social mobility depends on the *datasets* used, the analytical assumptions made, and the measures chosen (such as income, attainment, occupational group, or “cultural capital”). The definitions of classes and the distribution of population between them change over time, but the role of class remains a strongly plausible determinant of attainment. Concern over this has driven many of the education reforms outlined above. One of the motivations behind pioneering reforms such as the 1944 Education Act was

to remove this influence of family background and create educational careers open to talent. Ironically, 64 years later, schools are looking increasingly to parents to help them with learning delivery, attendance, and citizenship.

In a similar attempt to drive up “standards,” teaching has become an increasingly professionalized activity from nursery education through higher to adult education. Initial qualifications, both in specialist areas and in pedagogy, continuing training and development, and inspection and audit regimes are common. All staff working with children must have a clear criminal record check. The social standing of teachers appears to have declined at the same time, whether as a consequence or not. The increase in training and inspection is almost a reproach for past perceived failures. Nevertheless, there are now more teachers in the UK than there ever have been, and in some subject areas such as mathematics, the profession takes a clear majority of all graduates (Gorard et al. 2006).

50.2 Fundamentals, Organization, and Governance of the Education System (England)

50.2.1 Current Leading Ideas and Principles in Education Politics and Policies

Education in England is provided to over eight million pupils in approximately 25,000 schools (DCSF/National Statistics 2008g, (Table 2.1); all statistics in this paragraph are taken from this publication and relate to 2007). Approximately 18,000 are primary schools (catering for the age from 4 or 5 to 11); 3,400 are secondary schools (catering for young people aged 11 or 13 to 16 or 18), of which nearly 2,900 are classed as “specialist” schools; 56 are academies or city technology colleges (catering for same age ranges as secondary schools); 450 are pupil referral units (an alternative provision for children excluded from school or for whom ordinary schools are unsuitable); 1,000 are special schools (catering for pupils with learning difficulties or disabilities – although a majority of these children are educated in primary or secondary schools); and 2,300 are private (or “independent”) schools. Most of the above schools may be both coeducational (mixed) or single sex schools: there is no requirement for either kind, but local authorities must ensure that, as between boys and girls, there is an equal opportunity to receive single sex schooling in the area (see Harris 2007, Chap. 4). In recent years schools in the state sector have been encouraged to enter into cooperative partnerships with further education colleges, universities, businesses, and independent schools. There are also a small but growing number of all-age schools.

There is considerable diversity across the school system, a feature that has broad parental support (Ivens 2008). This diversity reflects both the long-standing accommodation of religious preference as a basis for choice in education and an ideological commitment to different models of school governance. For example, just under 20 % of secondary schools and over 33 % of primary schools in the state sector are denominational schools – schools with a religious character and linked to a

particular religion. Most of these denominational schools are Roman Catholic or Church of England schools, but there are also 37 Jewish schools, 7 Muslim, and 4 others (e.g., Sikh). Schools differ in terms of their internal structures of governance and degree of autonomy from the local authority. There are six categories of maintained school: “community,” “voluntary aided” (VA), “voluntary controlled” (VC), “foundation” (of which there are now two types), “special,” and “foundation special,” plus two additional forms of school for children aged 11 or over – city technology colleges and academies, which are located in urban areas and are sponsored by outside bodies although they receive most of their funding from the state. Denominational schools (above) will be either in the VA or VC category. A majority of pupils (71 % of those of primary school age and 84 % of secondary school age) are taught in schools with no religious character. Only 5 % of the pupils attending state-maintained secondary schools attend schools which are permitted to select their pupils on the basis of their academic ability (“grammar schools”). A growing number of schools are permitted, in principle, to select some of their intake on the basis of aptitude in specific curriculum areas.

Although when the Labour Government came to power (as “New Labour”) in 1997, it proclaimed that, in relation to education, “standards matter more than structures” (Department for Education and Employment 1997a), it understood that without altering parts of the basic framework of the education system, it would be unable to achieve the broad objectives of its reforms, which included an improvement in overall pupil achievement levels and especially among disadvantaged groups (those which experience or are at risk of “social exclusion”). Nevertheless, in implicitly undertaking to preserve the structural status quo, it was perhaps seeking to allay concerns that there might be any return to the massive interference with the governance of education which had occurred under the previous 18 years of Conservative government, especially the significant diminution in the role and power of local education authorities. Local education authorities (there are 150 in England and they are now generally referred to as “local authorities”) had enjoyed control over the secular curriculum and staff appointments in schools and budgetary control over individual schools, but the Education (No 2) Act 1986 and Education Reform Act 1988 changed that. At the same time, there was to be no real reversal of the centralizing of power and policy direction that occurred prior to 1997, nor in the way that schools themselves were governed at grassroots level. While, in essence, this vision has materialized, important changes have occurred to some structural areas and in particular to many key *processes* within the administration of education, such as those governing changes to the pattern and organization of schooling; the allocation and admission of pupils to schools; school discipline; and the regulation of schools and local authorities through inspection, reporting, and other mechanisms (although the official categorization of the school at the end of this process, as failing or underachieving, has continued). Above all, the trend towards increased regulation of education and its governance has accelerated over the past decade, particularly in areas such as standard setting, assessment, and reporting. As Balarin and Lauder (2008: 13) commented: “government control has strengthened to a point never seen before.”

Regulatory and policy direction is in the hands of central government, namely, government Secretaries of State and other ministers. The central government departments under their control are, since 2007, known as the Department for Children, Schools and Families (DCSF) and the Department for Innovation, Universities and Skills (DIUS). However, the quasi-autonomous statutory bodies responsible for funding and quality assurance in all sectors of education, such as the Learning and Skills Council for England (covering further education, which is full-time education for people aged 16 or over and any education for people aged over 18 which is not higher education), the Higher Education Funding Council for England (HEFCE) and the Office for Standards in Education, Children's Services and Skills (Ofsted) also exert regulatory control. The scale of central regulation within the education system in England is truly phenomenal. In addition to the processes mentioned earlier, it extends into every facet of education, including the way that: institutions are financed and governed; the curriculum in schools is structured and delivered; standards of provision are monitored and accounted for (including the setting of targets for levels of pupil attainment); ancillary services (such as meals, transport, and student financial support) are provided; and staff are appointed, promoted, remunerated, and disciplined. The Secretary of State has statutory powers, enforceable in the courts, to issue directions to the bodies with responsibilities for educational provision if they fail to carry out their duties or exercise them unlawfully. In addition, citizens often resort to litigation or various appeal processes to challenge the actions of such bodies and, since 2000 (when the Human Rights Act 1998 came into force), many of their legal arguments have centered on alleged infringement of their rights under the European Convention on Human Rights (see Harris 2005a).

50.2.2 Legislative Framework of the Education System

Legislation underpins the central control and direction of the English education system. *Primary* legislation, in the form of Acts of Parliament (statutes), is a dominant feature and a key instrument of educational reform. The politics of education have made rapid reform a constant feature of the past three decades, reflected in the growth in new primary legislation. The Education Act 1944 (discussed in Sect. 50.1) not only remained the principal statute on education until the 1980s, it was virtually unaltered over that period. But over the past decade in particular, many statutes of considerable length and intricacy have been introduced, affecting the organization and governance of education and making the legislative framework highly complex (for a detailed discussion, see Harris 2007). The key measures have been the School Standards and Framework Act (SSFA) 1998 (294 pages), the Learning and Skills Act 2000 (135 pages), the Education Act 2002 (221 pages), the Education Act 2005 (153 pages), and the Education and Inspections Act (EIA) 2006 (262 pages). The pre-1997 law was consolidated into the Education Act 1996, the longest ever education statute, which remains in force. At time of writing, another very long bill is before Parliament, the Education and

Skills Bill. The complexity of the law is reflected not only in the high level of detailed prescription within the statutes but also the way that new Acts amend existing ones as well as introducing new free-standing provisions of their own. In addition, a particular feature of all UK social legislation is the way that statutes set out powers to make *secondary legislation*, such as regulations or orders, exercisable by members of the executive (Secretaries of State and Ministers of State). This form of delegated legislation can be made rapidly, often with little Parliamentary scrutiny or debate. In the field of education, it adds considerable further detail to the already highly elaborate legislative framework contained in statutes.

50.2.3 Governance of the Education System

The way that legislation is used to regulate the governance of education in England is exemplified by the position of governing bodies of schools. Under the law, each school must have a governing body, which has separate corporate status. It will have overall control and responsibility for the running of the school. Under the 2002 Act the conduct of a school “must be under the direction of the school’s governing body.” The day-to-day running of schools and their management is undertaken by the head teacher and senior staff. The governing body has financial management responsibility for the school, whose budget has to be delegated to it by the local authority (see below). The constitution of the governing body is determined partly by regulations,¹ which prescribe various categories of school governor, and partly by the school’s “instrument of government.” A community school must have between 9 and 20 governors of whom at least 33 % must be parent governors, no more than 33 % and not less than two governors must be staff governors, 20 % must be local education authority governors, and not less than 20 % must be community governors. Parent and staff governors must be elected in accordance with the prescribed procedures (but if the head teacher chooses to be a staff governor, he or she will not need to be elected), community governors must be appointed by the existing governors, and local education authority governors are appointed by the authority. Separate regulations specify the procedures to be followed by the governing body at meetings.² The grounds on which a person may be disqualified from being a school governor, such as where they have a criminal conviction, are also set out in regulations.

These requirements concerning school governing bodies represent only the foundations of the broad regulatory framework for the running of schools. But even they are liable to be changed in accordance with education reform agendas. For example, the Education and Inspections Act (EIA) 2006 amended the general duties of school governing bodies. These amendments in fact tell us a great deal about the government’s current policy concerns. First, governing bodies must now

¹The School Governance (Constitution) (England) Regulations 2007 (SI 2007/957)

²The School Governance (Procedures) (England) Regulations 2003 (SI 2003/1377), as amended

exercise their role concerning the conduct of the school in such a way as to “promote the well-being of pupils at the school” and “promote community cohesion.” This duty reflects both a commitment by government to improve children and young people’s well-being and promote their welfare (Department for Education and Skills 2004a) – there are particular concerns about pupils’ mental health arising from social stress and the impact of bullying by other pupils and obesity – and a concern about racial tension, especially arising from social segregation. Secondly, the governing body must now have regard to the “children and young people’s plan” for the area. The drawing up of this plan is the responsibility of a local children’s services authority (which is, in effect, part of the local authority), and it covers education and social welfare. It reflects the integration of local authority services for education and social care under a framework prescribed by the Children Act 2004; one facet of this is the power under the EIA 2006 for the Secretary of State to recategorize the “local education authority” as simply the “local authority,” which would mean that the relevant functions would cease to be exercised by a separate legal entity. These developments are intended to contribute to a more coherent and holistic approach to support in this field, under a broad policy known as “Every Child Matters” (Chief Secretary to the Treasury 2003). The children and young people’s plan must indicate how the authority will seek to improve, among other things, children’s education, welfare, and “contribution to society.”³ In addition, a national *Children’s Plan* was published in 2007 by the DCSF, setting out a wide range of policy goals, including closing the gap in educational achievement levels for children from disadvantaged backgrounds (DCSF 2007). Measures such as this, which are intended to improve the well-being and opportunities for all children, are particularly intended to help children from socially disadvantaged backgrounds. Regulation has in fact been used to give education a central place in tackling social exclusion through measures to, for example, reduce the rate of exclusion from school, improve achievement levels among pupils from disadvantaged backgrounds, increase the proportion of the youth population above compulsory school age staying on in education, widen access to higher education, and ensure that opportunities for the effective exercise choice of school are extended across all social groups, for example, through improved provision of school transport and arrangements for parents to be assisted by publicly funded school choice advisers (see Department for Education and Skills 2003, 2005b, 2007).

Returning to the above example of school government legislation, a further amendment to the general duty of school governing bodies made by the EIA 2006 is that they must now “have regard to any views expressed by parents of registered pupils.” This is an interesting development because although to some extent it follows in the tradition of extending consultation duties owed to parents and in some case school pupils over matters concerned with the organization and management of education, such as changes to a school, it is the first time that parental views on the general conduct of a school have had to be taken into account

³The Children and Young People’s Plan (England) Regulations 2005 (SI 2005/2149), as amended

by law. It complements a duty introduced under the 2002 Education Act that local authorities and school governing bodies must have regard to central guidance on consultation with *pupils* over matters affecting them, guidance which “must provide for a pupil’s views to be considered in the light of his or her age or understanding”⁴ (thereby reflecting a general obligation under Article 12 of the UN Convention on the Rights of the Child).

In the past, school governing bodies have had to hold an annual parents’ meeting to provide an opportunity for discussion of their annual report and the way they have conducted the school. This is being replaced by a duty to maintain a web-based record, but in neither case has there been a specific duty to take parental views into account. Complaints by individual parents or groups about schooling have, in contrast, long been covered by a separate procedure requiring their determination. Taking into account parental views does not mean adhering to them. While parents enjoy some direct participation rights, for example, a right to vote on whether a school should retain admission on the basis of academic ability and to serve as a parent governor, the extent of their collective empowerment over schools (particularly if they come from disadvantaged social groups) is limited. Indeed, their participation in school government is regarded as having been marginalized by the increasing need for managerial competence and professional expertise in the running of schools (Hallgarten 2000). So although the promotion of a “partnership” model for parental participation in children’s education represents a policy continuity (see Moon and Ivens 2004) and is reemphasized in the *Children’s Plan*, which promises new legislation guaranteeing parents regular information from, and contact with, school staff and new “parents councils” to “ensure that parents’ voices are heard within the school,” it has an individualized focus. Parents’ collective role in the governance of education remains limited.

However, another facet of government policy to improve the educational opportunities of children at risk of social exclusion is to foster increased responsibility on the part of parents. Indeed, while promoting, on the one hand, the “empowerment” of parents through the exercise of parental choice and participation (Harris 2005b), the Labour Government has simultaneously pursued a firm policy objective of holding parents to account for their children’s behavior and promoting increased parental involvement in their children’s learning. In so doing, it has been argued, it has placed some of the pressure for raised levels of educational achievement by children on parents (Allred et al. 2002). As discussed more fully in Sect 50.4.3 of this chapter, the parental duty to ensure children attend regularly at school and behave well while they are there reinforced both through relatively “soft” measures, such as voluntary home-school agreements, first introduced under the School Standards and Framework Act 1998, and harder measures, such as the penalty notices issued by schools and parent orders or criminal law sanctions including fines and even imprisonment (reintroduced as a sanction in 2000) imposed by the courts. Parental rights in education concerned with decision areas such as those

⁴Education Act 2002, s. 176

involving the exercise of choice and access to information have, rather than empowering parents, tended to increase their responsibility for the children's education. The pressure on parents to make the right choices for their children has grown as these rights have extended. For example, the school admission process, in which parents have conditional rights of choice, was found to be "far from being... empowering" but rather "a time-consuming cause of much distress in the lives of many families" (House of Commons 2004). In 2006–2007, 80,010 appeals were brought by parents over admission decisions, of which approximately one-third succeeded (DCSF/National Statistics 2008a, Table 1).

Administration of the school admission appeal system is one of the continuing functions of local authorities. The role of local authorities as the dominant partner in the provision of education post-1944 and an important democratic element in the shaping of local educational provision has, as noted earlier, been radically diminished, particularly as a result of the mandatory delegation of financial management to individual schools (noted above). The role of local authorities today in connection with educational provision is predominantly a planning and promotional one, although they retain statutory responsibilities in the key areas of enforcing school attendance and ensuring that children with special educational needs are identified and receive the appropriate provision, including provision arranged by the authority itself. The government viewed the local authority as having a strategic role in deciding when and where new schools are needed but as "commissioning rather than providing education" (Department for Education and Skills 2005b: 103). The government contemplated largely removing authorities' power to establish new schools and leaving it to community groups and other organizations to compete for the opportunity to establish a school in the area, although subsequently they backed down and agreed to enable local authorities themselves to be competitor. Local authorities also retain powers to intervene in problematic schools, including withdrawing a governing body's control over its budget; they therefore operate as a long stop when management control has broken down in a school. Their duty under the Education Act 1996 to "contribute towards the spiritual, moral, mental and physical development of their community" by ensuring that "efficient" primary, secondary, and further educations are available in their area continues, as does their duty to ensure that there are sufficient schools making appropriate provision for the local population. In ensuring such provision, authorities must (since 2006) aim to "secure diversity in the provision of schools" and increase opportunities for parental choice.

Reflective of the general trend towards the limited empowerment of parents, noted above, is a new statutory duty for local authorities to consider any representations made to it by a parent about how the authority is fulfilling its above "sufficient" schools' duty and to respond in writing to them, although arguably what is contemplated is a kind of individual complaints process rather than an opportunity for collective parental influence to be brought to bear. Local authorities have also been placed under a new duty by the EIA 2006 to exercise their functions with a view to "promoting high standards... and the fulfilment by every child concerned of his educational potential." The latter, somewhat aspirational, requirement – one that in fact seems incapable of enforcement – is clearly linked

in policy terms to a broad government emphasis on “personalized learning” (a “tailored education for every child and young person”: Department for Education and Skills 2005b: 4.1). The Children Act 2004 has also given local authorities a specific duty to promote educational achievement by “looked after” children.

50.2.4 Financing of the Education System and Its Infrastructure

Local authorities receive central government funds for educational provision based on the calculations within “standard spending assessments” which form the basis of each authority’s allocation, but they also receive grants under specific schemes such as the Ethnic Minority and Travellers Achievement Grant (see Sect. 4 below), or for the provision of sixth-form (post-16) education, or to enable them to pay education maintenance allowances to support young people continuing their education post-16. Most of the funding that authorities receive in respect of schools expenditure is delegated to individual schools. Maintained schools are for the most part wholly dependent on this funding (although some supplement their income through sponsorship arrangements with companies in the private sector). Schools receive a delegated “budget share” from part of the local authority’s “individual schools budget,” which is the budget available for distribution to schools (on the basis of prescribed criteria) after the local authority has deducted various central costs, such as administration and specialist support services. Although all local authority maintained schools are guaranteed state support, “voluntary-aided” schools have to fund 10 % of their own capital expenditure.

Higher education institutions in England, mostly universities, are awarded funds by the HEFCE for teaching and research but also have to raise a substantial portion of their income through student fees and external research income (from the research councils or from public, private, or tertiary sectors). Further education colleges largely depend on allocations from the Learning and Skills Council; the Council prescribes the courses or kinds of provision for which it will provide funding (see Sect. 50.3 below).

50.2.5 Public and Private Sector Relationships

As illustrated in each section of this chapter, public education in the UK is largely funded by the taxpayer but retains a complex and generally tolerant relationship with a small private sector. A substantial proportion of preschool and nursery care is privately provided, but only around 6–8 % of the subsequent compulsory age cohorts attend private schools. Private schooling is most prevalent in England, with as little as around 2 % in Wales and 1 % in Scotland. There are about 2,500 private schools, although the figure is very volatile as schools frequently open, close, and merge. The volatility is caused largely by very small schools, affecting very few pupils, often emerging from home schooling or schemes built around curricula for minority religions or sects. In the next tier of private schools are the small proprietorial schools

run as businesses, often in converted residential accommodation. Finally there are the public and preparatory schools and their imitators, run as charitable foundations, sometimes with a long history. St Peter's school in York, for example, had a Roman headmaster in the fifth century and, in the seventh century, a head teacher who was also a chancellor to Charlemagne. There is in addition a large and probably unmeasurable industry of crammers and tutors ranging from services provided by individuals advertised in local shops to after-school programs.

In the last decade, there has been a growth of private supply and intervention in the publicly maintained sector of schools. These include partnership arrangements between businesses and schools; business sponsorship of one of the new types of "independent" state schools, such as academies; and even private takeovers of education authorities deemed "failing." Private schools are now sponsoring some state-funded academies. Perhaps the most visible and contentious change has been the private finance initiative (PFI), started in England and now copied in many other developed countries. PFI is used by the government in a number of public policy areas, including health and education, to help provide the scale of resources needed to rebuild public infrastructure. In summary, firms in the private sector generate finance for capital building projects, such as new school buildings, which are then leased back over 30 years by the local authority. The project is then managed by the private company for profit. Advocates claim that the projects are more likely to be delivered on time and budget, but opponents then suggest that this is an expensive kind of loan for the taxpayer (Green 2005).

The private sector in higher education is even smaller than at school level. Buckingham advertises itself as the only private university in the UK. However, there is a small number of other recognized institutions in the private sector, operating on a commercial basis. One of them, the College of Law, which is a commercial provider of professional legal education, recently became the first nonuniversity body outside the state education system to be permitted to award degrees. In addition, a small but also hard to measure number of UK residents will study at a distance or by correspondence with overseas private universities or colleges of variable quality.

50.3 Overview of the Structure of the Education System

50.3.1 Introduction

The ages of compulsory education in England are basically 5–16; under the Education Act 1996, parents' duty is to ensure that their child, if of compulsory school age, receives an efficient full-time education suitable to his or her age, ability, and aptitude and to any special educational needs he or she may have, at school "or otherwise." There is legislation in prospect at time of writing (the Education and Skills Bill) that will, in effect, increase the upper age, although young people will have the option of training, including work-based training, as an alternative to attending school or college education. This reform is based on the

rationale that: *“Continuing in education or training has benefit for individuals, increasing their skill levels and better preparing them to find and succeed in employment. It is also important for the economy, which will increasingly demand more highly skilled employees and benefit from individuals’ increased earnings.”* (Department for Education and Skills 2007, Chap. 2.2)

A young person would have to remain in such education or training (or an apprenticeship) until his or her eighteenth birthday. So far as the entry age of 5 is concerned, in practice, many children are able to start school before their fifth birthday (whether in a nursery education or in a primary school “reception” class), and through government promotion, there is an expectation that education will start well before the child turns five. Indeed, since 1997, the government has placed a considerable emphasis on “early years” education (see below).

Local authorities and schools have discrete responsibilities in respect to children with “special educational needs” (including those with physical or mental disabilities). Although many of these children are educated in the mainstream, alongside other children, it is appropriate to discuss the distinct requirements applicable to them separately (see below).

50.3.2 Elementary Level (“Early Years” Education)

A range of developments has taken place over the past decade in connection with the education of children below compulsory school age. The SSFA 1998 began this process by requiring local authorities to ensure that their area has sufficient places (whether in local authority or other establishments) for education (“nursery education”) suitable for children aged 4 and to establish an “early years development partnership” with responsibility for preparing an “early years development plan.” Since then, a government-funded nursery education place, giving up to 12.5 h per week of education (or, since April 2007, up to 15 h in some authority areas), for 38 weeks of the year, has become guaranteed to all 3-year-olds as well as 4-year-olds. Most 4-year-olds receive this education in state-maintained nursery or primary schools, but in the case of 3-year-olds, a majority (55 % in 2007) receive their education in the private or voluntary sector (DCSF 2008b). A “foundation stage” for children aged 3–5 receiving nursery education was added to the statutorily prescribed national curriculum in England, under the Education Act 2002. The “early learning goals,” “educational programs,” and “assessment arrangements” which were laid down for this new stage had to be implemented by all those who provided nursery education funded by local authorities (including, of course, local authorities themselves).

The policy of integrating education and childcare provision for young children, on the basis that good quality provision in both areas is needed *“to enhance children’s social and intellectual development in a safe and caring environment”* (Secretary of State 1998, Chap. 1.4), led to other changes under the Education Act 2002. The above plans were renamed “early years development and childcare plans,” and a corresponding change was made to the name of the partnerships

responsible for them. This integrated approach was reflected in other child policy developments, including the government's *Every Child Matters* policy (2003) (see part 2 above); the associated "Sure Start" programs, which provide advice and support on health, early years education, and parenting; the amalgamation of education and child welfare services provided by local authorities (see above); and the establishment under the Children Act 2004 of Children's Trusts, which are local partnerships drawn from education, social care, careers services, youth offender support, and community and voluntary groups (HM Government 2004). Moreover, the government's Five Year Strategy for Children and Learners promised "educare" so that childcare would be available outside nursery education sessions (Department for Education and Skills 2004b).

The Childcare Act 2006 has placed local authorities under a duty to ensure that childcare, which is defined by the Act as including education, is available free of charge for children aged between 3 and compulsory school age. Non-maintained school providers of childcare must be registered. All providers must implement the requirements for children's welfare, learning, and development prescribed by law⁵. A new Early Years Foundation Stage replaced the "foundation stage" for this age group under the national curriculum (above) with effect from September 1, 2008. It covers "welfare requirements" and "learning and development requirements." Both sets of requirements are prescribed by secondary legislation made by the Secretary of State. The 2006 Act says that the learning and development requirements must cover (a) personal, social, and emotional development; (b) communication, language, and literacy; (c) problem solving, reasoning, and numeracy; (d) knowledge and understanding of the world; (e) physical development; and (f) creative development.

50.3.3 Primary Education

Primary education is, essentially, full-time education suitable for children who have not reached the age of 10.5 years and those aged under 12 whom it is expedient to educate alongside them. Generally it is provided in primary schools, the exception being "middle schools" which usually cater for children in the range of around 8–13 years. Research has revealed that there are wide variations in the level of funding for primary education across England and suggested that it is less generously funded than secondary education (Noden and West 2008).

Regulations made by the Secretary of State may determine the length of the school day and school year;⁶ however, they merely stipulate that the school year should comprise 380 (half-day) sessions (in effect, 190 days) and that there should

⁵Childcare Act 2006, Part 3 Chapter 2; and the Early Years Foundation Stage (Learning and Development Requirements) Order 2007 (SI 2007/1772), as amended by the Early Years Foundation Stage (Learning and Development Requirements) (Amendment) Order 2008 (SI 2008/1952).

⁶Education Act 1996, s.551; the Education (School Day and School Year) (England) Regulations 1999 (SI 1999/3181), as amended by SI 2001/1429 and SI 2007/3071

be a break between two sessions on the same day. Government policy emphasizes the principle of “flexibility over the length and size of individual lessons and the school day” (Department for Education and Skills 2002: 4). The dates of school terms and holidays must be fixed locally, by the local authority or governing body, depending on the category of school. The timing of school sessions – in other words, the times at which school sessions start and end – must be determined by the governing body. The DCSF made *recommendations* on the length of the school week, in terms of teaching hours per pupil, nearly 20 years ago and has not amended them since. The guidance says that the aggregate minimum weekly lesson time per week should be 21 h for 5–7-year-olds and 23.5 h for 8–11-year-olds (DES 1990). However, it seems that successful primary schools generally provide in excess of these minima (Office for Standards in Education 2002). The Secretary of State is, in effect, precluded by the 2002 Education Act from specifying the amount or proportion of school time that is to be devoted to a particular subject or subjects under the national curriculum (see below).

The school curriculum is the subject of general requirements, in Part 6 of the 2002 Act. These are that it must be “balanced and broadly based”; promote pupils’ spiritual, moral, cultural, mental, and physical development; and prepare pupils for the “opportunities, responsibilities and experiences of later life.” The school must have, as its basic curriculum, religious education (even in nondenominational schools) and the national curriculum. There is no national curriculum in Scotland but there is one in Wales. The list of national curriculum subjects is prescribed by the 2002 Act but can be amended by secondary legislation, which is also used to prescribe the attainment targets for pupils in each subject, the programs of study, and the assessment arrangements for the key stage in question. There are four “key stages”: Key Stage 1 (KS1) comprises children aged 6 or 7, while KS2 covers children aged between 8 and 11 years. The other key stages relate to secondary education (see below). The national curriculum for KS1 and 2 in England comprises three “core” subjects – mathematics, English, and science – and seven other “foundation” subjects (design and technology, information and communication technology, physical education, history, geography, art, and music). It is planned that by 2010 all pupils in KS2 will also be entitled to learn a modern foreign language other than English. Sex education is not a compulsory element of the basic curriculum until KS3, but “personal, social and health education,” which may include elements of sex and relationship education, is provided, on a non-statutory basis. Pupils must also take part in a daily act of collective worship in school, but a parent has an unconditional right to withdraw the child from religious education and/or collective worship in school.

Pupils are assessed at the end of KS1 through a summative teacher assessment of speaking/listening, reading, writing, mathematics, and science and the completion of externally set tests or tasks (“SATs”) in mathematics, reading, and writing. Since 2005 only the teacher assessments have had to be reported, although they are informed by the pupil’s performance in the tests/tasks. The proportion of children reaching the expected attainment level (level 2) or higher at the end of KS1 varied from 80 % in writing to 90 % in mathematics. Girls outperformed boys in all the assessments (DCSF/National Statistics 2007). Further, more broad-ranging

assessments take place at the end of KS2. The results of this assessment are published and widely reported. The KS2 results for 2008 (DCSF/National Statistics 2008b) show that the expected level of attainment (level 4) or better was achieved by 81 % of pupils in English, 86 % in reading, 67 % in writing, 78 % in mathematics, and 88 % in science. Mathematics was the only subject in which boys outperformed girls.

50.3.4 Secondary Education for Young People Aged 11–18

Secondary education is mostly provided in secondary schools, city technology colleges (CTCs), and academies (see above). Secondary education is full-time education suitable for young people aged 12–18 (inclusive) and for those aged at least 10.5 years educated alongside others from that older age group. Those who attend an institution principally providing education for young people aged 16–18 are in secondary education if their institution is maintained by the local authority; this means that those receiving education suitable for people aged over compulsory school age will in many cases be receiving “further education,” not secondary education. In some cases young people attend school for part of the time and are taught in a further education college for the rest of the time. They too are classed as being in secondary education if the college provision is of a kind available in schools.

Some secondary schools are permitted to select their pupils for admission wholly or partly on the basis of their academic ability, but the circumstances are limited and the law provides that no schools which do not already operate selection may be permitted to do so in the future. Such selection is, however, possible for entry to classes for those aged above compulsory school age. In any event, the way that school admission policies operate, particularly through the use of residential zones (“catchment areas”), has effectively imposed entry barriers to some schools and a degree of social segregation notwithstanding the general bar on selection by ability/attainment and legislation affording parents an opportunity to make a preference for a school (see Harris 2007, Chap. 5).

The legal requirements concerning the length of the school year and number of sessions noted above in relation to primary education apply also to secondary education. However, the recommended minimum hours of class time per week are higher (e.g., 24 h per week in the case of pupils at KS3 – ages 12–14). Nevertheless, the recommendation is somewhat meaningless given the extraordinary demands placed upon secondary schools to deliver a very broad curricular program. Certainly schools face a challenge to structure school time to accommodate the relevant curriculum requirements and statutory collective worship, although guidance has been issued by the DfES (now DCSF) and Qualifications and Curriculum Authority (QCA) (see, e.g., DfES/QCA 2002).

The basic requirements of the curriculum outlined in relation to primary education above, including religious education, apply also to secondary education. Secondary schools must also include sex education as part of their basic curriculum. While CTCs and academies are not covered by the statutory requirements on the

curriculum, they are obliged by their agreement with the Secretary of State which sets out the terms on which they are to operate, to ensure that these are met. The national curriculum applies up to the end of KS4 (pupils aged 15–16 years). The normal expectation is that pupils will sit public examinations (the General Certificate of Education (GCSE) – a “level 2” qualification) at the end of KS4. Typically between 5 and 10 GCSE subjects will be studied by a student, assessed by examination and/or coursework. At present, the core subjects of the secondary national curriculum are mathematics, English, and science. The other foundation subjects are, at KS3, design and technology, information and communication technology, history, geography, music, physical education, art, citizenship, and a modern foreign language. At KS4 there are the above core subjects plus the further foundation subjects: ICT, physical education, and citizenship. However at KS4 the national curriculum also includes prescribed “elements” (which include work-related learning) and an “entitlement” to follow a science-based course which leads to a prescribed qualification.⁷ The “entitlement areas” can be extended when relevant provisions are brought into force.⁸ But in any event, this is a transitional period, as the curriculum for young people aged 14–19 is in fact being substantially reformed.

Among other things, the 14–19 reforms (Department for Education and Skills 2005a) aim to enable pupils to opt for level 1 (foundation), 2 (higher), or 3 (advanced or progression) diplomas across a range of vocational areas in place of part of the more academic elements (such as GCSE or advanced level (“A” level)). A third qualification route is an apprenticeship, led by employers; places will inevitably remain limited, but the government is committed to increasing the number available. Those facing the greatest barriers to learning and who may not be ready for a diploma program, mostly likely to be those with learning difficulties or disabilities, will enter the “Foundation Learning Tier” which will provide them with “progression routes” leading towards, for example, to a Foundation Diploma or an apprenticeship; it is being introduced, initially on only a “small scale,” from September 2008 (DCSF/National Statistics 2008c, Chap. 6). The new diplomas are the key reform. The reform will be phased in, initially within some areas only, from September 2008, when five subjects, ranging from “Construction and the Built Environment” to “Society, Health and Development,” will be available. All 17 diploma subjects will be introduced by 2011, and full implementation of the new curriculum will be in place by 2013. The reform will also carry through into the post-compulsory school age group. Students will, for example, have a choice of traditional academic “A” level courses at 17 and 18 – usually 3 or 4 “A” levels are taken – or level 3 post-16 diplomas. However, the new 14–19 curriculum will also enable students to take GCSE or A level courses alongside diplomas.

⁷Education Act 2002 Act s.85, as substituted by the Education (Amendment of the Curriculum Requirements for Fourth Key Stage) (England) Order 2003 (SI 2003/2946), as amended by the 2006 Act s.74(4), and the Education (National Curriculum) (Science at Key Stage 4) (England) Order 2007 (SI 2007/2241)

⁸Education and Inspections Act 2006, s.74(1)–(3)

One of the key features of the new diplomas, which may include work-based learning, will be an emphasis on skills – “functional skills” and “personal, learning, and thinking skills.” The aim of the age 14–19 reforms is, according to the government to provide “*an attractive learning route for young people at all levels of ability who find practical learning related to the world of work more motivating and engaging than purely theoretical learning, but who want to keep their options open through taking an educational programme rather than training for a specific occupation*” (Department for Education and Skills 2007, 4.6; see also DCSF 2008).

Although the diplomas and qualifications are meant to have an equivalence to standard academic qualifications (the Advanced Diploma is meant to be equivalent to three and a half A levels), the Nuffield Review of 14–19 Education and Training (Nuffield 2007) has highlighted the risk that the diplomas will be regarded as the “poor relation” to the traditional academic qualifications.

The diplomas will be new qualifications leading to an external award – that is, an award made by an outside body and not a school or employer. In order to be properly recognized as having national standing, and for schools to be permitted to provide a course leading to them and for authorized bodies (such as local authorities) to be permitted to fund them, all such external qualifications require formal approval (accreditation) under the statutory framework set out in the Learning and Skills Act 2000. A body known as the Qualifications and Curriculum Authority (QCA) advises the Secretary of State, who formally grants approval for qualifications. Anybody which awards the qualifications must also meet regulatory requirements imposed by the QCA, relevant to recognition of the awarding body. There is a wide range of awarding bodies, in respect to both academic and/or vocational qualifications (such as AQA, Edexcel, City and Guilds, OCR, LCCI, UCLS, and so on). Under changes planned to be introduced, with QCA support, under the forthcoming Education and Skills Bill, organizations will be able to be given the power to award or authenticate qualifications, thereby making it unnecessary for them to seek formal approval for them from the Secretary of State via the QCA. This will facilitate employers, for example, being recognized as awarders of qualifications (QCA 2008). The QCA itself is also being restructured. Its above regulatory functions are currently performed by the Office of the Qualifications and Examinations Regulator (“Ofqual”) operating within the QCA. Future legislation may give Ofqual an independent status. It is also proposed that a new independent committee will be established to advise on the provision and associated funding of individual qualifications, known as the Joint Advisory Committee for Qualifications Approval DCSF/ National Statistics (2008e). This committee will provide termly recommendations and conduct biennial assessment of qualifications being offered. It is expected that this will lead to a streamlining of qualifications, with those taken by only small numbers of pupils likely to be recommended for discontinuation of approval. The QCA itself will be restyled into a development agency, the Qualifications and Curriculum Development Agency. The QCA’s various powers under current legislation (the Education Act 1997, as amended) include enforcement powers where conditions attached to recognition or accreditation are not being met.

50.3.5 Education for Children and Young People with Special Educational Needs

In 2008, 17.2 % of the children in schools in England had special educational needs (SEN) of various kinds (DCSF 2008e). SEN are legally distinct from disabilities per se. The Education Act 1996 Part IV covers the former and states that a child aged 5 or over has SEN if, and only if, “he has a significantly greater difficulty in learning than the majority of children his age” *or* has a disability which prevents or hinders him or her from making use of standard educational facilities within the area. A child aged under 5 will have SEN if he or she is likely to have one of these forms of learning difficulty when he or she is aged 5 or over. The three most common classifications of SEN are “moderate learning difficulty”; “behavior, emotional, and social difficulty”; and “speech, language, and communication needs.” Under the 1996 Act, local authorities and schools have a wide range of duties concerning identification of the children with learning difficulties, the assessment of their needs, and the funding of the required provision. Parents (who are regarded as “partners” with the authorities in working towards meeting children’s needs) have various rights, such as to information and to appeal against various decisions. There is a *Special Educational Needs Code of Practice* (Department for Education and Skills 2001); the purpose behind this is to maximize consistency of approach between different local authorities, which (along with schools) have a statutory duty to have regard to the code.

There continue to be both private and state “special schools” providing education for children and young people with SEN. Note that special education is not divided into “primary” and “secondary” education/stages, as children’s development does not tend to conform to standard age expectations, although some schools cater for particular age ranges. However, there is in this field of education a long-standing principle of “inclusion.” This is based on the idea that, wherever possible, children with SEN should be educated alongside other children in mainstream schools, not special schools. When the national curriculum was introduced from 1989 in England, it was made clear that children with SEN should have access to it. Moreover, there is a well-established principle that, wherever possible, children with SEN should “engage in the activities of the school together with children who do not have [SEN].” Also, following the amendment of the law by the Special Educational Needs and Disability Act 2001, local authorities have been under a duty to ensure that children with SEN are educated in mainstream schools, as long as the child’s needs are not such that the authority needs to prepare a formal “statement” of them. If there is such a “statement” for the child, there is still a statutory presumption in favor of a mainstream statement; but such a placement is conditional on it being compatible with parental wishes and with the efficient education of other children in the school.

Statements are made following a formal assessment in which account is taken of a variety of professional views. In many cases it will be decided that a statement is not needed and that the arrangements for meeting the child’s needs can be described in an “individual education plan” prepared by the school. At the start of 2008,

approximately 16 % of the children with SEN, or 2.8 % of all children, had statements. Of these “statemented” children, 56.6 % were being educated in mainstream schools, 36.9 % in state special schools, and 3.6 % in independent (private) schools (DCSF/National Statistics 2008f). Independent schools often provide highly specialist forms of education, catering, often with residential provision, for children with particular forms of disability such as cerebral palsy or severe behavioral problems. These schools can only be the specified placement in a child’s statement if they have been approved by the DCSF. However, this private provision can be very expensive. Any educational provision specified in a child’s statement must be funded by the local authority (although increasingly the funding for such provision is being delegated to schools). This is a major reason why disputes between the parents and the local authority over school placement are common, especially since the statute gives parents conditional rights of choice (Harris 2007). Often disputes concern the issue of mainstream-versus-special school placement. The First-tier Tribunal hears appeals over these and other SEN disputes. The tribunal also hears complaints about disability discrimination, which is covered by the Disability Discrimination Act 1995, although relatively few cases have been brought since this jurisdiction commenced in 2002. A “disability” under the 1995 Act is defined as a “physical or mental impairment which has a substantial and long-term effect on [the person’s] ability to carry out normal day-to-day activities.” In practice, a child or young person with a disability for the purposes of this Act is highly likely to have SEN under the 1996 Act; but not all children with SEN would be classed as disabled under the 1995 Act (see Blair and Lawson 2003).

Local authorities are under duties to review statements annually and, in any event, parents and schools have a right to request that a formal assessment of the child is carried out and to appeal if the request is refused. The annual review in year 9 (when the child will normally be 13–14) must include the drawing up of a “transition plan” setting out proposals concerning the next phase of the child’s education. The SEN Code of Practice advises that the views of the young person himself or herself should be fed into the review. Subsequent reviews must focus on the plan, which is particularly concerned with what will happen when the child leaves school. The annual reviews will consider the child’s progress and could lead to a proposal to amend a statement so as to alter provision. The placement could, for example, change from a special school to a mainstream school.

50.3.6 Further, Adult, and Higher Education

For the past decade, government policy has been directed at increasing the levels of participation in further or higher education, both among younger participants and adults, for whom the promotion of “lifelong learning” is a specific policy area (Department for Education and Employment 1997b, 1998). This policy has been underpinned by the introduction of targeted financial support for particular groups, such as adult learners and those from disadvantaged backgrounds (Harris 2007, Chap. 4).

Further education is defined by the Education Act 1996 as full-time and part-time education for people over compulsory school age which is not secondary education (essentially, education in a school) or higher education. However, further education colleges provide courses leading to many of the post-16 qualifications which are provided in schools; the line between secondary and further education is an increasingly blurred one. The responsibility for ensuring proper provision of facilities for further education and training essentially lies with a government agency, the Learning and Skills Council for England (LSC). The LSC has a new duty, added by the Further and Training Act 2007, to act with a view to encouraging diversity in the education and training made available to individuals and to increase opportunity for individuals to exercise choice. The LSC also allocates funds for courses provided by further education institutions, which gives it considerable leverage over institutions' activities. Moreover, once the 2007 Act is brought fully into force, the LSC will have considerable powers of intervention in respect to any failings by institutions. The institutions which provide further education are primarily established as "further education corporations," which means that they are essentially independent bodies with their own board of governors. In general they operate inclusive policies, making diverse provision for those beyond compulsory school age from the most basic academic level to foundation degree level (which means that some higher education provision (below) actually takes place in further education institutions).

Figures for 2007 show that 79 % of 16-year-olds, 67 % of 17-year-olds, and 44 % of 18-year-olds were in full-time education, around one-third of whom (in each age group) attended a further education institution (DCSF/National Statistics 2008c, Table 2). By the age of 18, 24 % of young people in full-time education have progressed onto a higher education institution.

Adult education has become a relatively low priority in recent years. While adult students are commonly enrolled on further education courses, whether vocational or academic, adult education per se – that is, courses on subjects of general public interest, such as art history or "keep fit" – has either been phased out from the further education sector as funding has been withdrawn or has become restricted in availability due to the need to charge fees for attendance. Many older people are nevertheless enrolled on basic skills courses which can lead onto higher-level academic or vocational courses.

Higher education covers first- or higher-degree courses as well as courses leading to various professional diplomas and qualifications. It includes part-time courses, such as professional development courses for groups such as nurses and teachers, and master's degrees. The pattern of the UK's degree courses already conformed broadly to that adopted within the European Bologna process, with full-time first-degree courses typically involving 3 or 4 years of study and a master's degree for 1 year. Most of the higher education institutions (HEIs) in England are heavily dependent for their funds on HEFCE (see above), which allocates funds for teaching and research. There are 130 HEIs receiving funding via HEFCE. The total funding allocation by HEFCE for 2008/2009 is just under £7.5 billion, of which £1.4 billion is specifically allocated for research. The allocation to a higher

education institution (HEI) of income based on research reflects a range of factors including the quality of research activity, as measured by a range of performance indicators, including doctoral completion numbers and rates, external research grant income, and how departments' publications are rated by assessment panels.

Most HEIs are classed as universities; others are higher education colleges. The Further and Higher Education Act 1992 enabled institutions known as "polytechnics" to be reclassified as universities (they are often still referred to as "new" universities). There is a procedure by which the title "university" may be bestowed upon an institution and a separate power granted to enable them to award degrees. Among the institutions recognized is the Open University, which offers distance learning towards a wide range of degrees and has played a key role in "lifelong learning." A list of institutions which are recognized is prescribed by statute; people who run institutions which are not recognized and offer unrecognized ("bogus") degrees can be prosecuted by law.

Although the government originally had a target participation rate of 50 % among 18-year-olds for higher education by 2010, it acknowledged that this was overambitious and that participation was likely to increase "towards" that figure by that year (HM Treasury et al. 2004, p. 89). It currently stands at around 43 %. Financial support for students is acknowledged to be very important in ensuring participation, even though the courts have held that such support is not guaranteed under the right to education contained in the European Convention on Human Rights.⁹ For most students financial support from the state takes the form of a loan; students must start to repay the loan only when they enter employment giving them an annual salary of at least £18,000. In addition, legislation provides for those from the poorest background to be entitled to an annual maintenance grant. There is also a grant for disabled students. In order to be eligible to receive HEFCE funding, HEIs must enter into "access agreements" with the Office for Fair Access setting out the ways in which they will work to increase the proportion of their entrants from disadvantaged backgrounds. HEIs' plans will typically include the offer of bursaries or scholarships. HEFCE also provides financial incentives to institutions to widen access, under its "Widening Participation" allocation (which takes particular account of the higher education participation rate in the local area where the student's family lives), and through general direction of activities designed to target and work with communities whose members are underrepresented among higher education students (HEFCE 2007). HEFCE has allocated a total of £364 million for widening participation by HEIs in 2008/2009, covering widening access from people from disadvantaged backgrounds, improved rates of retention of students, and widened access and improved provision for disabled students (HEFCE 2008). Provided they meet the widening access criteria, HEIs have a degree of flexibility over the fees they can charge for entry to courses, up to a maximum of £3,000 for most first-degree courses.

⁹*R (Douglas) v North Tyneside Metropolitan District Council and the Secretary of State for Education and Skills* [2004] ELR 117, Court of Appeal

50.4 Developments in the Current School System

50.4.1 Transition Between Levels of Education

Other than the issues of school choice, the few remaining grammar schools, and a small private sector, the school systems in England, Scotland, and Wales are untracked to the age of 16 in the sense that progression to the next stage or type of school does not depend upon attainment or performance at the last stage. Schools are supposedly comprehensive in their intake. What happens instead is that as pupils get older, they are increasingly placed into “sets” or classes by ability and performance. Unlike the tracked systems prevalent in other countries, this means that pupils continue to mix in activities that are un-setted (such as cultural and sporting activities). It also permits a more personalized profile such that a pupil might excel in one subject but not another. The early key stage tests (SATs) are often used by schools to justify the allocation of pupils to sets, and both SATs and sets are related to the number and type of qualifications attempted at age 16. Setting seems to be used because of the theory that it is easier to teach pupils in groups of similar prior attainment, and the policy is seemingly reinforced by the national regime of target-setting for standards. Whether it is actually easier for pupils to learn in groups of similar prior attainment is the subject of some dispute.

Continuation in education or training after the age of 16 is now expected of all, but education currently bifurcates at 16 in practice. Those pupils deemed suitable for a traditional sixth-form education (and often then higher education) are those who obtain qualifications equivalent to national framework level 2 – such as five or more GCSEs at grades A* to C. This is not a legal requirement but one imposed by most institutions. Such students would study for level 3 qualifications, such as A levels, including AS and A2 levels, and, increasingly, a mix of general vocational qualifications (GNVQ and BTECs), the international baccalaureate, or pre-U (university) examinations. Students deemed less successful at school currently tend to leave at or before 16, to continue in school or college and retake qualifications at level 2, or to take different kinds of courses not traditionally leading to higher education. The 14–19 Reforms in England, and similar approaches in other home countries (see Sect. 3 above), are attempting to overcome this bifurcation in practice, by providing a blend of academic and vocational elements, which it is hoped will lead to greater parity of esteem between routes, and greater opportunity for those students dissatisfied with the existing provision.

Issues of widening participation to subsequent educational opportunities, such as higher education, are dealt with elsewhere in the chapter.

50.4.2 Instruments of Quality Management, Testing, and Inspection

Each home country has a body developed from the office of Her Majesty’s Inspectorate for Schools, previously termed OHMI, with responsibility for inspecting and reporting on the quality of education in schools and making

recommendations for closure, improvement, special measures, and so on. In England, this body is called OFSTED and was reconstituted in 2007 to deal with standards in education, children's services, and the development of skills. It, thus, regulates care for children and education and training for people of all ages. It is, at least in theory, independent of ministerial control, reporting direct to Parliament. Maintained schools and education providers can expect regular inspections, especially so if a past inspection has given cause for concern.

There has been ongoing debate about the amount of warning that an inspection should require. Some evaluators feel that unannounced inspections give the most accurate picture, while providers tend to prefer warning so that they can reasonably prepare the amount of documentation that inspections increasingly require. OHMI would previously have had a major focus on lesson observation, but OFSTED has moved towards "light-touch" inspections to reduce the time and expense required for each visit. This has led to greater reliance on publicly available indicators such as value-added measures of pupil progress between key stages than on lesson observation, and so this led to the reported anomaly that teaching could be observed as good but pronounced only satisfactory or worse because of the value-added scores (and vice versa). Reports of all inspections and other data are available via the OFSTED website.

The production, marking, and moderation of qualifications has become a large industry in the UK as elsewhere. Examination boards, able to provide nationally recognized certificates, are to a large extent commercial companies, even where they are offshoots of university boards, and they are in competition with each other for clients. This leads to considerable diversity in forms and modes of assessment, with the consequent difficulty of maintaining moderated standards between them. Currently the six major boards in England are AQA, City and Guilds, Edexcel, LCCI, OCR, and UCLS (see Sect. 3 above). These are also in common use in the other home countries, which often also have their own boards such as WJEB in Wales, which in turn are also used in England and elsewhere. In 2008, the government employed a company, ETS Europe, to run the Key Stages 2 and 3 tests for children in England. They were unable to arrange for the marking of the papers by the deadline, leading to a delay in the announcement of results and considerable public and media disquiet. Coupled with the more regular concerns over standards of marking, lost papers, and so on, this delay contributed to the reorganization of the QCA and its division into two parts – broadly one concerned with development and commissioning of tests and one with maintaining quality (see Sect. 50.3 above). It also contributed to the announcement that Key Stage 3 SATs in England will no longer take place from 2009, as part of a range of measures including the introduction of US-style report cards for schools.

Until the 1980s, public examination standards were maintained by the use of norm-referencing. The hundreds of thousands of pupils in each age cohort were deemed to have the same overall level of ability or talent, and so the proportion of passes and of each grade for any qualification was fixed within quite strict limits. This solved the problem of moderating the difficulty of papers across years and subjects but meant that growth in qualification across cohorts was only really

achieved by increased entry patterns. From the 1990s, moderation has moved towards criterion referencing, whereby candidates are awarded passes and grades for demonstrating mastery of prespecified skills or areas of knowledge. Since that time, there has been an annual growth in qualifications, leading to a sterile political debate every summer over whether this portrays rising standards or “dumbing down.” The answer is, of course, that we have no real way of knowing (Gorard 2000).

Perhaps the growth in qualifications can be explained partly by changes in the nature of assessment. Terminal examinations are now rarer, candidates can take qualifications in smaller parts or modules, the chances to retake modules are increased, and the proportion of coursework prepared at leisure is higher today than in the 1980s. All of these factors might properly increase the success of candidates. The boards themselves work hard to try and ensure consistency within their work, and across modes and subject of assessment, and they employ increasingly sophisticated statistical techniques to help them. In general, higher education institutions and professional development bodies make considerably less effort to try and ensure consistency of marking, even internally. A degree at one university in the UK is often awarded without reference to degrees awarded at other universities. The grade or class of degree awarded is completely unrelated to the prior qualifications of the student intake, and there is little or no moderation of the results between the subjects within each university (Gorard et al. 2006).

50.4.3 Coping with Special Problems (Truancy and Exclusion)

Poor behavior and attendance at school have become critical areas of concern, and a range of measures have been taken to combat them. Unfortunately, however, the problems continue and show little sign of improvement. From the government’s policy perspective, the principal difficulty arising from truancy and bad behavior leading to disciplinary exclusion from school is the impact on the individual pupil’s education and thus their attainment levels and future opportunities. Both problems were the subject of the first report by the government-sponsored Social Exclusion Unit (1998), which explained their link with reduced educational attainment and increased criminality, unemployment, and unstable family relationships in later life. The first two statutory measures, in 1998, involved the placing of school governing bodies under a duty to set and/or meet annual targets for reducing the level of truancy in their school and a new power for designated police officers who find children in a public place (such as a shopping center) during school hours to take them to their school or to the care of the local authority. “Truancy sweeps,” where police and education welfare officers visit city centers to look for possible truants, have become common. These measures are built on the existing criminal procedure (prosecution of parents) and civil measure (an “education supervision order” granted by a civil court to a local authority).

A parent, regardless of whether or not he or she is aware that the child is truancying, commits an offence and can be prosecuted by the local authority in a magistrates court if his or her child is absent from school without lawful excuse.

The maximum penalty that can be imposed is a fine of £1,000. A new offence was introduced in 2000: where a parent “knows that his child is failing to attend regularly at the school and fails without reasonable justification to cause him to do so.” If found guilty of this more serious offence, the parent could face a maximum penalty of a £2,500 fine and/or imprisonment for up to 3 months. An estimated 7,500 prosecutions are brought each year, and in approximately 80 % of cases, the parents are convicted (National Audit Office 2005, Chap. 3.24). A few years ago, a new “fast-track” procedure for truancy cases was introduced; in these cases the parent is notified of the prosecution, but the case does not come to court if the attendance has improved within six weeks of the notice, which happens in approximately one in every three cases. The evidence on the effectiveness of prosecution cannot be discussed in detail here (see Harris 2006 for analysis), but it seems that it is only useful in reducing truancy where the parents have a degree of control over their child’s behavior or where the child’s pattern of truancy is not too well established. Also possible, since 2004, has been the issuing of a penalty notice to a parent of a truanting child. This places the parent under an obligation to pay a penalty of £50 or, if they do not pay within 28 days, £100 or else face prosecution. Parents can also now be invited to enter, voluntarily, into a parenting contract or can have a parenting order imposed on them by a court following a prosecution by the local authority. The parenting contract can include an agreement that the parent attends a program of guidance or counseling designed to “ensure” that parent causes the child to attend regularly at his or her school. Classes in good parenting can also be a compulsory element of a parenting order.

Official figures, published by the DCSF in February 2008, show that in 2006–2007 1 % of all half-days were lost due to unauthorized absence from school, which means that on each school day an average of approximately 63,000 pupils were absent from school without a lawful excuse. This is a record high, although *authorized* absence (e.g., due to illness or religious observance) fell as compared with the previous year. The increase in truancy has occurred despite the fact that government expenditure on anti-nonattendance measures since 1997–1998 has exceeded £1 billion and diverse enforcement measures have been introduced. Nonattendance rates are highest among travelers of Irish heritage, Gypsy/Roma children, and those of mixed white/African-Caribbean heritage. A discussion of the various social factors contributing to these figures is not possible here.

The number of children excluded from school each year rose during the 1990s as schools became increasingly intolerant of bad behavior due to its impact on the teaching process, in particular its potential effect on attainment levels in schools. Schools were also concerned about the damage poor discipline could cause to a school’s public image and thus its market appeal. Schools had been advised that exclusion should be a “last resort,” but government pressure on schools to be well-ordered places, meeting targets for pupil attainment and taking a tough stance on both drugs in schools and bullying by pupils, made it difficult for them to show leniency towards misbehaving pupils. Permanent exclusion peaked at over 12,500 cases in 1996/1997 but has fallen most years since then, probably because the government’s guidance (which schools must take into account) has placed an

increasingly strong emphasis on the taking of measures to avoid permanent exclusion and the fact that a high exclusion rate is seen as a negative performance indicator for a school and schools face greater frequency of official inspection if their exclusion rate is high. In 2006/2007 there were 8,680 permanent exclusions from school in England, the lowest level since 1999/2000, although the number of fixed period (temporary) exclusions, 363,270, represented an increase of 7 % on the previous year (DCSF/National Statistics 2008d).

Schools are permitted to exclude pupils either permanently or for any period or periods totaling not more than 45 school days in any school year. They have no power to suspend a pupil from school for an indefinite period. The duties on local authorities to find alternative education for pupils excluded from school and for governing bodies to ensure that pupils excluded for a fixed term are nevertheless provided with educational activities have been strengthened under the EIA 2006. A local authority must find the excluded pupil a place in education within not more than six days from the exclusion. Particularly if the exclusion is permanent, the placement will often be in a “pupil referral unit.” With a view to ensuring that children excluded for a temporary period are less likely to face future exclusion when they return to school, head teachers have been placed under a duty to arrange an interview with the parents with a view to ensuring the child’s proper and effective reintegration into the school. Another new measure reflecting concern for the welfare and progress of excluded pupils is a duty under the 2006 Act for parents to ensure that their child does not spend the first week of exclusion wandering the streets: the parents can be served a penalty notice or prosecuted if the child is found in a public place during that period. Parenting contracts and parenting orders, discussed in relation to truancy above, have also been possible in cases where a child has been permanently excluded from school. But the 2006 Act has extended the circumstances when they can be entered into or imposed to cases where the child has been engaging in behavior likely to cause significant disruption to education or a significant detriment to any child’s welfare, regardless of whether the child has been excluded, and to cases where a fixed period of exclusion is likely.

Schools have also been given a specific power, under the Violent Crime Reduction Act 2006, to search pupils suspected of carrying a knife or another offensive weapon and take possession of such an item. The EIA 2006 also gave them clearer powers to confiscate other items in pupils’ possession. School staff has a power to use “reasonable force” to prevent the commission of offences, personal injury, or prejudice to good order and discipline. But there is no lawful excuse for corporal punishment of pupils, and this extends to its use in independent schools as well. It is too early to say whether these new measures have brought about improvement to discipline in school.

50.4.4 Measures and Instruments for the Integration of Foreign-Born Pupils

The UK has high rates of immigration and applications for asylum, although the latter has fallen to 23,000 in 2007 from its zenith of over 84,000 (or 102,000 if

dependents are included) in 2002 (Home Office 2008a). In 2007 the largest numbers of asylum seekers were of Eritrean, Afghan, Iranian, Somalian, or Chinese origin. Also in 2007, 125,000 people were granted settlement in the UK (Home Office 2008b). The education system is regarded as having a crucial role in the integration of immigrant communities, particularly through the teaching of English and aspects of citizenship, which is now a national curriculum subject (see above) but is also the subject of a test to be taken by all those seeking a right of abode in the UK. There is also an imperative, reinforced in part by international law, to recognize the importance of a person's mother tongue, although this does not give a right to mother tongue teaching for those whose first language is not English and much of the mother tongue teaching in the UK is given by community groups themselves (Harris 2007). It should also be recognized that there are various indigenous languages within the United Kingdom apart from English. In addition to Welsh, Gaelic (Northern Ireland and Scotland), and Scots, which are all taught in the respective parts of the UK and in some cases are used as the medium of teaching (Harris 2007), there are also languages spoken by far fewer people such as Cornish and Manx. But speakers of these indigenous languages will generally be bilingual. However, the same is not necessarily true of people from other countries. For example, over 40 % of people of Indian or Pakistani origin in the UK will not have English as their first language. In recent years many migrant workers from Eastern Europe have also come to the UK, in some cases with young families. The fact that schools have a right to omit from their published academic results the achievements of children who have been in the UK for less than 2 years shows that such children will often have a great deal of catching-up to do.

Children for whom English is an additional language may be temporarily exempted from the national curriculum in England and Wales to enable them to receive extra English language tuition. But immigrant children also have the possibility of studying a language such as Urdu, Punjabi, or Chinese as their "modern foreign language" under the national curriculum. Schools in England can receive special additional funding from the government's Education Standards Fund, which includes an Ethnic Minority and Travellers Achievement Grant (EMAG) to help to fund arrangements for assisting immigrant pupils and to raise their levels of achievement. In general both EMAG and the special arrangements for the inclusion of children from asylum-seeking families have been found to be effective, although a few local authorities have faced intense problems in having to accommodate large numbers of such children in their schools, while in other cases the policy of dispersing asylum seekers around the country has led to some being relocated to areas with inadequate resources.

50.5 Educational Discourses, Trends, and Perspectives

Education policy in the UK has been increasingly devolved to the four home countries. The following remarks focus largely on changes to policy and practice in England.

In the final years of the Labour Government, which ended its period in office in May 2010 after defeat in the general election, Parliament enacted the *Apprenticeships, Skills, Children and Learning Act 2009*. It aimed to set in place more effective educational and training arrangements for young people above compulsory school age and to establish improved regulatory and development frameworks for academic qualifications. There was also a drive to extend and clarify the disciplinary powers of teachers, building on measures adopted under the *Education and Inspections Act 2006*. For example, teachers gained additional powers to search pupils for prohibited items and, for the first time, such powers were specifically extended to the further education sector. The Act's provision for an improved complaints process for parents and pupils was scrapped by the coalition government before it had been introduced nationally.

One of the significant features of education reform from the 1980s onwards was the decline in power and influence of local government over education. One aspect of that had been the removal of much of further education provision from direct local authority responsibility. Among the efforts by the Labour Government to reverse that trend was a new duty under the 2009 Act for local authorities to "secure that enough suitable education and training is provided to meet the reasonable needs" of persons aged 16–19 in their area and those with learning difficulties aged 19–25. Other new duties imposed on local authorities under the 2009 Act are those of "encouraging participation in education and training" among young people aged over 16 and ensuring that there is enough education provision (and training for those aged 16 or over) for those in youth detention. One of the final measures introduced by the Labour Government involved the abolition of "local education authorities" (LEAs). This title was removed from all education legislation. Since April 2010 the functions performed by LEAs are carried out by "local authorities." Labour's final education statute was the *Children, Schools and Families Act 2010*. It is perhaps more significant for the part on "pupil and parent guarantees" that was removed from the draft legislation by the government in order to reduce opposition and ensure enactment before the general election than for what remained in it. This part would have required the Secretary of State for Education to issue a "pupil guarantee" setting out what a pupil is entitled to respect from his or her school, in relation to the "pupil ambitions" (relating to quality of education, safety at school, response to their needs, and so on), and a "parent guarantee" stating what the parent was entitled to respect from the school. These measures, while having a rights orientation, would also have served Labour's policy objective of increasing the parental role and involvement in their child's education.

The Coalition government of Tories and Liberals which came to power in May 2010 immediately set about extending the academies program, building on the autonomous school model developed under Labour but aiming to extend it. Academies are funded by the state, subject to meeting the conditions as regards their operation stipulated in their "academy agreement" with the Department for Education. Compared to other state-funded schools, academies have considerable curricular freedom, although the Coalition government's *Academies Act 2010* makes it clear that they would be expected to have equivalent duties towards

children with special educational needs as other schools and that their curriculum should be similarly balanced and broadly based. The role of administering funds to them now belongs to the Education Funding Agency (which replaced the Young People's Learning Agency for England). Since the government wants academy status to be the norm across the state schools system, an amendment contained in the *Education Act 2011* requires that where a local authority finds a need for a new school in its area, it must seek proposals for an academy only. However, the main reason for the growth of the academy sector has been the legal changes introduced by the *Academies Act 2010*, designed to extend the opportunities for the establishment of these schools. All state schools, including special schools and primary schools, are now eligible to apply to the Department for Education for an order giving them academy status. Moreover, the Act empowers the Secretary of State to make an order providing for the conversion of an existing school to an academy, if it is the school that is "causing concern" and as such is "eligible for intervention." As a result of a minor amendment made by the *Education Act 2011*, to be eligible for academy status, a secondary school no longer has to have a defined curriculum specialism.

One of the problems with academies, which now comprise over 50 % of all state secondary schools, is that because they lie outside the local authority sector, there is no local body with responsibility for monitoring their functions and able to exert influence when things are not going well. This has resulted in an accountability gap which the government is only now beginning to address through the proposed establishment of regional regulators or "chancellors" supported by boards of head teachers. Academy status is formally held by "free schools" as well.

The prevalence of academies and free schools in any local authority in England is strongly linked to the increased clustering of nonwhite, EAL (English as an additional language), SEN (special educational needs), and FSM-eligible (entitlement to free school meals) pupils into specific schools. The more academies there are in any area, the more segregated the local school system tends to be. For example, for 2012, there was a correlation of +0.55 between the number of converter academies in the local authorities (LAs) of England and the segregation of FSM-eligible pupils between secondary schools. This is even larger than the correlation between the level of FSM segregation and the number of selective schools in each area (+0.51). By contrast, there is a negative correlation (−0.56) between FSM segregation and the percentage of LA-controlled nonselective schools.

If academies and free schools are causing this segregation, then they are more problematic than grammar schools because unlike grammar schools their numbers are growing over time. Heavily disadvantaged schools, which must result from segregation, tend to have less-experienced teachers with higher staff turnover, poorer resources and plant, and larger attainment gaps. Pupils in such schools tend to have lower aspirations and are treated differently and perhaps unfairly by the system in many ways. All of this potential "pain" is being risked for little likely gain. There is no convincing evidence that any one type of school is intrinsically superior to any other in terms of pupil attainment and qualifications. The differences between schools are largely differences in pupil intakes, exacerbated by

selection and diversity. Even where children selected by faith, social class, or aptitude appear to do better, the children not so selected appear to do worse. The result for the national school system is a zero sum.

The coalition government's most comprehensive education statute to date has been the above-mentioned *Education Act 2011*. In addition to the amendments it made to the *Academies Act 2010*, it provided for the abolition of the Qualifications and Curriculum Development Agency. Controversially, it also abolished the General Teaching Council for England (GTCE) which maintained a register of teachers and exercised disciplinary functions over them. The government asserted that the GTCE lacked effectiveness both in raising standards of teaching and controlling misconduct. The 2011 Act also made further reforms in the area of school discipline. One that was particularly controversial enables a school to identify particular items, such as mobile phones, which it wishes to add to those already prohibited for bringing into school under legislation (such as offensive weapons), which may be searched for and seized by staff. Another change which has caused concern is that searches may be made of data or files on an electronic device which a teacher has removed from the pupil as a prohibited item. The Act also abolished the right of appeal against a permanent school exclusion, replacing it with a weaker "review" system. The 2011 Act also made some very modest reductions in the duties of school governing bodies and local authorities.

Reform is ongoing in the English education system. Currently the *Children and Families Bill* which is before Parliament will, if passed, make substantial changes to the legal framework for provision in respect of SEN. The aims include making the system less adversarial and easier for parents to navigate, extending opportunities for parental choice, and integrating education, health, and care planning for children with the most severe needs. A proposed amendment to the Bill to make sex education compulsory in all schools lacked government support and was defeated.

Having abolished the Education Maintenance Allowance (EMA) intended to assist young people from poorer families to stay on in education at the age of 16, the current government is presiding over a quiet revolution already set up by the previous government in 2008. From September 2013, all young people currently in their first year of secondary school in England must remain in education or training until the age of 17. Young people now in primary school must continue in education right up to the age of 18. This is the most recent raising of the education leaving age in a long-term historical trend. In 1880, the school-leaving age was originally set at 10. In 1893 it was raised to age 11 and then to 13 in 1899. In 1918 it was raised again to 14, then 15 in 1944, and 16 in 1972. On each occasion the same three kinds of arguments were made for the increase in compulsory education. It would protect young children from exploitation by employers, it would make the system fairer by increasing participation among the most disadvantaged families, and it would improve "human capital" both for individuals and for the state. The latter is apparently necessary to meet the demands of international competition and the nature of modern employment. And on each occasion, the same kind of opposition was voiced. It was an erosion of liberty and choice, it would be expensive (extra staff and classrooms), and it was only being done in an attempt

to improve the unemployment figures. The latter point was particularly important in 1918 and 1944 with large numbers of conscripted service personnel suddenly released onto the job market. It may also be a factor today with England still in the grip of an economic downturn. Given that some young people already wish to leave school by the age of 14 or even earlier, raising the education leaving age to 18 may cause short-term resentment for those forced to stay on. And this could lead to disruption for other students who would have wanted to stay on anyway. As with the prior achievement gap, it might be better to sort out why people want to leave school even before the age of 16 and try to solve that problem (if it is a problem), rather than just increase their “sentence.”

In 2013, the Education Secretary for England announced that the national curriculum for schools was to be overhauled, with a new subject structure and lists of content, for September 2014. He and the prime minister both said that this new curriculum is what the schools of England need for the future and what they would want their own children to be taught. Critics have already said that it is too prescriptive, not underpinned by evidence, and that implementation is too soon given the ongoing changes in school assessments and structures. Many academics, teachers, and teacher organizations have opposed the idea of a national curriculum since it was introduced following the *Education Reform Act* 1988. This was partly due to the political ideology attributed to its origins. In retrospect, however, it can be seen as a natural further step towards truly comprehensive schooling. Where the 1944 Education Act created free universal schooling, and Circular 10/65 moved that schooling away from selection, the *Education Reform Act* began the creation of a school structure that was not merely comprehensive in organization but was also comprehensive in nature and process. It defined the nature of a specifically English compulsory education. Everyone was entitled to a place at school, that place should not be allocated on the basis of ability or ability to pay, and it would not matter where one lived in the country because the provision should be equivalent in all areas. Of course, none of the above is dependent on the national curriculum remaining the same over time – the key is the ideal of a common entitlement to schooling and equivalence between all maintained schools. Nor does the argument above suggest that the proposed mix of subjects is the right one, or that it should be academic in nature as opposed to vocational, generic, or to do with personal development. The curriculum should evolve over time, as knowledge increases and priorities change. However, policy at present is contradictory. The current Education Secretary supports the growth of academies and now free schools which are exempt from the national curriculum (making it not “national” in any sense), despite also saying that the new curriculum is one that everyone deserves.

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