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LIBERAL EDUCATION

A WAY FORWARD



4liberty.eu is a network of several think tanks from CEE (Poland, Hungary, Slovakia, Slovenia, the Czech Republic, Bulgaria, Estonia, Lithuania, and Germany) and our partners from EaP countries. Our goals: to make the Central European perspective accessible to an international audience, to be a reliable source of information on regional issues, and act as the voice of the region. Our authors are experts, intellectuals, and researchers. We publish high-quality analyses, polemics, and articles in English, building bridges between nations to further understanding among experts from particular countries. Our website, 4liberty.eu, is designed to become a platform where experts and intellectuals representing liberal thought from Central and Eastern Europe can share their opinions and ideas.

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Learning to Educate

Education. It may seem that everything has already been said on the topic, right? Everyone needs it, and yet, according to UNICEF, 59 million primary school-aged children are still denied their right to it. It would therefore appear that we, Europeans, are in quite a privileged position in this regard. However, even we still have not mastered the issue fully. What makes education such a hot topic in the region once again? The reason is simple: politics.

With the recent rise of populists to power in Europe (Hungary and Poland, just to name a few) and their growing influence (in Italy, the UK, and France), education experts in the CEE region look up to the Nordic countries to seek inspiration and proof that liberal solutions in education may actually work. Estonia, an educational beacon of hope for many, still shines brightly and offers a set of best practices that others would like to emulate. In the meantime, Poland prepares for an incomprehensible education reform to be set in motion in September 2017. On the basis of the planned changes, one thing is clear: a school of hard knocks is undoubtedly in store not only for the country's educators, but students and their parents too.

Just as societies and labor markets evolve, education should too, in order to keep up with the pace of changes. Any ongoing or anticipated reforms shall ensure that education does not mean closing oneself in the ivory tower but rather broadening one's horizons so that the students of all education levels can pass the exam in real life with flying colors. However, more often than not, education is currently used as yet another tool for garnering political support, which can easily backfire. *Ipsa scientia potestas est*¹ is no more in the eyes of politicians. Now, education is merely *an instrument* of exercising power.

Although, as Dorothy Parker once said, "you cannot teach an old dogma new tricks", we choose to believe that it is still possible. After all, to quote Nathaniel Hawthorne, "It is a good lesson – though it may often be a hard one – for a man (...) to step aside out of the narrow circle in which his claims are recognized". Since it is a lesson we are willing to teach, we shall do our utmost to try to convince politicians and decision makers that education is not something to be toyed with, but rather a very complex system, the equilibrium of which rests solely on the compatibility of all elements involved. Thus, we give you the sixth issue of *4liberty.eu Review*, which – by providing an overview of past, present, and potential education reforms in the CEE countries as well as giving insight into good and bad practices from various education systems in the region – may fill in the blanks and offer much needed solutions for other states on the brink of similar processes. Let us learn them by heart in the hope that a more liberal approach can be, truly, a successful way forward.

Read and learn,

Olga Łabendowicz
Editor-in-Chief of *4liberty.eu Review*
Coordinator of *4liberty.eu network*

¹ Latin for "knowledge is power".

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Back to Humboldt: Why Education Needs Freedom



*

DETMAR
DOERING

Every three years some hundreds of thousands of 15-year-old students in OECD countries are interviewed by researchers about their competence in basic skills like reading, writing, and mathematics. Whether one likes it or not, the Programme for International Student Assessment (PISA) makes an enormous impact on policymakers. A country's low ranking usually leads to more or less hectic reform efforts and calls for more government funding for education. But is more money the best answer? Or should we strive to rediscover Wilhelm von Humboldt's dictum that freedom matters most? Although personal and economic freedoms have an enormous impact on the educational performance of a country, the topic is rarely investigated or seen as politically relevant.

While politicians often react to PISA results with more funding, experts have not believed in a linear correlation between money and educational results. "For the majority of OECD countries with average or high spending levels, there is essentially no statistical relationship between spending per student and outcomes in PISA"¹, a study by the European Commission stated in 2016 after the latest PISA results were published. The reasons for this are manifold. It starts with the general inability of the state to make efficient use of its resources. Egalitarian politicians tend to lower standards in order to make degrees available for everyone — thereby decreasing the value

of those degrees. Governments might have different ideas about what education should achieve than parents. In short, a state-run market for education might not work well no matter whether more or less money is spent.

If not funding, then, what could improve education? While there has been some research on the role of equality or the lack thereof in education, hardly any academic analysis focuses on the relationship between education and freedom. Perhaps egalitarians fear that freedom could lead to more inequality in education, whereas liberal-minded individuals fear that egalitarianism could lead to a down-levelling of education. However, freedom and equality do not necessarily contradict each other.

Most liberals would never dream of rejecting equal opportunity for all. Rather, they argue that forced equality leads to worse results and that a choice-oriented education system increases the general quality of education. Or, to quote Milton Friedman, "A society that puts equality before freedom will get neither. A society that puts freedom before equality will get a high degree of both"².

Those, however, are very specific questions about the organizational part of education, such as whether we should introduce school vouchers, charter schools, or private education. Although experts have tried, it is extremely difficult to analyze and compare the organizational elements, which vary hugely across countries, then correlate them with a country's educational performance. It might be a futile busi-

¹ European Commission (2016) *PISA 2015: EU performance and initial conclusions regarding education policies in Europe*, Brussels, p.11. Available [online]: https://ec.europa.eu/education/sites/education/files/pisa-2015-eu-policy-note_en.pdf. The authors of the PISA study agree: "Since 2006, standards in science have flat-lined, with less than a quarter of countries improving their performance". And that is despite a spending increase in OECD countries of 20 percent per primary and secondary student (!). Source: <http://www.oecd.org/pisa/launch-of-pisa-2015-results.htm>

² Bedrick, J. (2015) *Does School Choice Increase Inequality?*, Cato Institute Commentary, July 20. Available [online]: <https://www.cato.org/publications/commentary/does-school-choice-increase-inequality>



WILHELM VON HUMBOLDT (1767-1835)

Friedrich August von Hayek once thought him to be Germany's "greatest philosopher of freedom". In 1792, during the French Revolution, of which he was skeptical despite (or because of) his liberal creeds, Humboldt wrote his most famous book, *The Limits of State Action*, published posthumously in 1851. He showed that individual freedom and self-education were the proper basis of the state. For that purpose, the state would have to limit itself to its minimal size to protect the individual and their right to freedom.

Humboldt became involved in the politics of his native Prussia, sometimes as a minister in the royal cabinet or as a diplomat. As an outspoken liberal he was at odds with the monarch and was ejected from the cabinet several times for his critical attitude.

When he was in charge of a ministry (Minister for Education, 1809-1811, Minister for Estate Affairs, 1819), he proved to be an extraordinarily able administrator. In 1809, he launched a wholesale reform of the educational system that ended aristocratic privilege and gave a high degree of autonomy to schools and universities, as well as freedom of thought and research. Through his efforts, Germany became the country with the most highly developed educational system in Europe.

When, in 1819, the so-called "Karlsbad Decrees" curtailed the right to freedom of speech and other basic civic freedoms, he resigned from politics. In his old age, he preferred to dedicate the rest of his life to literary and linguistic studies.

His early work on freedom has continued to inspire liberal thinkers ever since – most notably, John Stuart Mill, who borrowed the main idea of his classic book *On Liberty* (1859) from Humboldt.

ness, too. What constitutes a good education is a complex question that can hardly be resolved with simple formulas³.

While the organization of an educational system undoubtedly matters, educational performance may well be strongly influenced by the overall dynamics of a society – whether it encourages education, whether knowledge is freely available or

suppressed, whether it offers intellectual stimuli for self-education, or whether people are challenged by competition.

All this challenges the conventional assumption that schooling is roughly the same as education. You are educated by all sorts of situations and challenges in life outside school. Your family, friends, job, and innumerable other things contribute to the development of personality and, thereby, to education. Therefore, the conclusion that freedom is a better tool for education than money spent on (state) schooling is, in the end, plausible.

³ This, by the way, is an important argument for why education needs freedom and why education should not be subjected to state planning.



FREEDOM,
ACCORDING
TO HUMBOLDT,
IS THE BEST PRE-
CONDITION
FOR THE DEVELOPMENT
OF HUMAN BEINGS
AND SHOULD
BE THE GUIDING
PRINCIPLE
IN THE POLITICAL
WORLD

A life spent in freedom will yield better results in education than one dominated by political hierarchies and uniform social engineering by the state.

Though this may sound “economistic” to some people (especially those who complain about the largely imaginary dominance of “neo-liberalism” in the political discourse), this basic question about organization and educational performance echoes the ideas of traditional humanism as formulated in the late 18th century by Germany’s greatest liberal educational reformer, Wilhelm von Humboldt⁴ [See

⁴ For further information on Humboldt see Doering, D. (2004) “Philosopher of Freedom – Wilhelm von Humboldt and Early German Liberalism”, [in:] *Journal of Liberal History*, Issue 44, Autumn; Doering, D. (2006) “Wilhelm von Humboldt et les rigenes du libéralisme llemand”, [in:] Nemo, P. and J.Petitot (eds) *Histoire du libéralisme en Europe*, Paris.

Frame]. Freedom, according to Humboldt, is the best pre-condition for the development of human beings and should be the guiding principle in the political world. That may sound metaphysical and abstract to others. Thus, the question arises whether those assumptions are supported by facts and data. It is time to put the results of PISA in the context of other, freedom-related statistics.

WHAT ABOUT ECONOMIC FREEDOM?

Economic freedom may contribute most to competitiveness and undoubtedly improve educational performance. In public opinion, it may also be the most controversial. Its effect would be indirect as long as it does not affect the organization of the educational system directly. When comparing educational performance and government spending on education, most people assume a strong correlation showing that greater spending improves performance.

Luckily, we possess a tool to do this comparison. Since 1996, the Canadian Fraser Institute and a consortium of about 100 international research institutions (including the Friedrich Naumann Foundation for Freedom) annually publishes a study called “Economic Freedom of the World”. The comparative index measures the degree to which the policies of 159 countries support economic freedom. The cornerstones of economic freedom are personal choice, voluntary exchange, freedom to compete, and security of privately owned property.

Forty-two components and sub-components are used to construct a summary index and to measure economic freedom in five areas: 1) size of government; 2) legal structure and protection of property rights; 3) access to sound money; 4) international exchange; and 5) regulation⁵. Each component and sub-component is placed on a scale from 0 to 10 that reflects the distribution of the underlying data.

⁵ For the latest report (2016) see: <https://www.fraserin->

Since its launch, the index has confirmed that countries with a high degree of economic freedom enjoy higher average incomes, higher growth, higher life expectancy, and a higher degree of happiness than countries with a low degree of economic freedom. The question is, does this also concern education? If we rank the OECD countries in three groups according to their degree of economic freedom and correlate the data with their PISA results on a 1000-point scale (Figure 1), then compare it to OECD data on government spending (also ordered into three groups according to the share of public spending of GDP), the result may come as a surprise. While there is no visible correlation between government spending and PISA performance, the correlation between economic freedom and the PISA results is strikingly positive. The more economic freedom, the better the educational results [See Figure 1].

... AND PERSONAL FREEDOM

An argument could be made that this comparison neglects aspects of freedom that could be better linked to educational performance, namely, personal freedom. Of course, economic and personal freedom are deeply interwoven. Freedom of the press, for instance, is to most people a kind of non-economic freedom, but a closer look reveals that a substantial part of that freedom is identical with entrepreneurial freedom. On the other hand, there is a common prejudice of many anti-capitalist agitators that economic freedom can be separated from or are, actually, detrimental to civil freedom and the rule of law. However, one should rather argue that economic freedom is a specific application of the principles of civil liberties and rule of law. If reduced

to its core meaning, economic freedom means the freedom to conclude voluntary contracts with others and to have these arrangements protected by law.

Still, it is worthwhile to test whether what holds for economic freedom also holds for personal freedom. Does it correlate positively with the PISA results? In order to make this point, one can resort to the "Human Freedom Index", published by the Cato Institute (USA), the Visio Institute (Slovenia), and other research institutions.

The Human Freedom Index (HFI) is "the most comprehensive freedom index so far created for a globally meaningful set of countries"⁶. It "presents a broad measure of human freedom, understood as the absence of coercive constraint. It uses 79 distinct indicators of personal and economic freedom"⁷.

For our purpose, we have omitted the HFI's data on economic freedom so as to focus on the data on personal freedom. The data cover 1) rule of law; 2) security and safety; 3) movement; 4) religion; 5) association, assembly, and civil society; 6) expression; and 7) relationships.

When the data are related to the PISA results and held against government spending on education, the result is not surprising (Figure 2). Personal freedom has a profoundly positive effect on education, while government spending is fairly inefficient [See Figure 2].

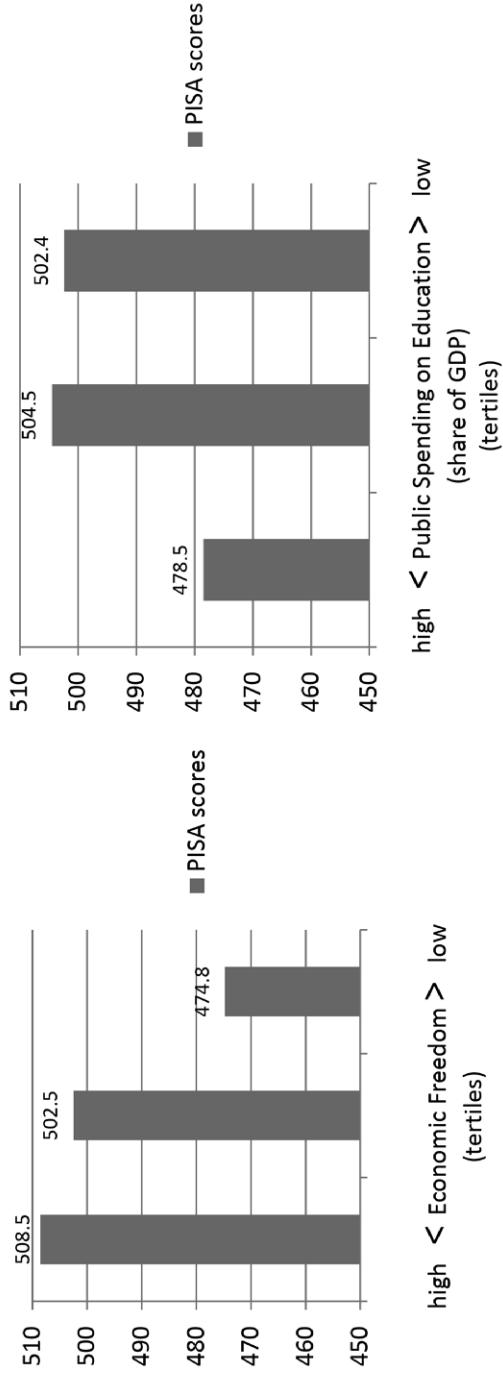
PRIVATELY OR NOT? HOW TO ORGANIZE GOOD EDUCATION

One could argue that freedom, or more specifically economic freedom, should go hand in hand with more direct freedom in

⁶ <https://www.cato.org/human-freedom-index>

⁷ <https://object.cato.org/sites/cato.org/files/human-freedom-index-files/human-freedom-index-2016.pdf>

Figure 1. Money or economic freedom?



Source: Economic Freedom of the World 2016 OECD/PISA 2016 OECD Data Education Spending

the organization of the educational system. Although it is probably impossible to measure, what we do know is the share of private spending on education in the OECD countries. It would be plausible, to say the least, that economic freedom would increase that share. However, it does not (Figure 3). Once again, we observe countries ranked according to their degree of economic freedom and their share of GDP in government spending. They are correlated with their respective share of private spending on education. Surprisingly, while there is no significant correlation between economic freedom and private spending, there seems to be a strong link between private and government spending. Thus, more government spending also means more private spending [See Figure 3].

There could be many explanations for this. First, you can have a state-run educational system that leaves a lot of choice to its “customers” (i.e., school autonomy). You can also have a system like in Germany, where almost all private institutions are subsidized by government and thus subordinated to fairly strict government rules that limit freedom. At the same time, in some countries, the government monopoly on education may bring about such terrible results that people try to escape into the small private sector, which therefore may become more costly because supply is not allowed to meet demand. Thus, private spending will be neither an expression of educational freedom nor of high quality standards.

Although all these matters cannot be resolved here, for the moment it might be sufficient to say that narrow organizational factors in the education system may not be irrelevant, but also do not play such a vital role in educational reform that many reformers think. Rather, it seems that the potential unleashed by the

general degree of freedom in a society has some impact on educational performance. This impact must be found within the individuals who live in that society and want to make use of it. In short: freedom unleashes creativity.

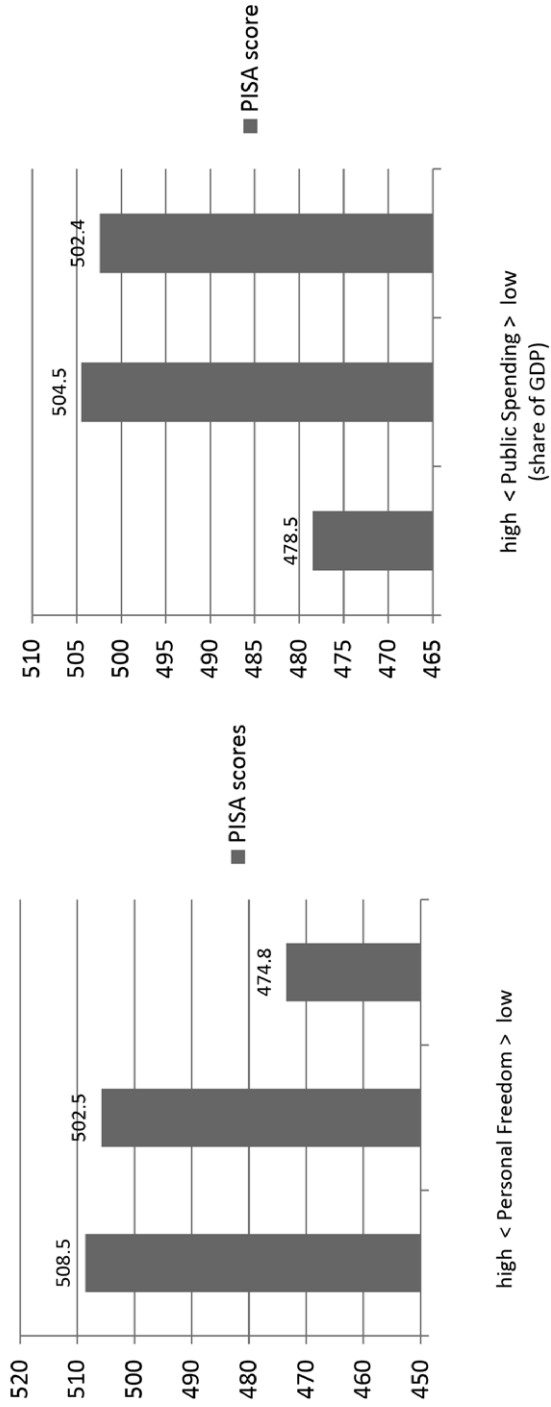
The more freedom, the less state coercion is needed to get people educated. In the end, one could, just like Humboldt, question the necessity of organized schooling at all. With less freedom, advancing through the state school system seems more necessary because there is less room for opportunity or creativity. Without the right credentials in low-freedom countries, you are locked into a hierarchy and economic/social class. At least in high-freedom countries, you can create opportunity, find an alternative, or have other chances to advance. You do not need the credentials or connections as much, although they might still be helpful.

CREATIVITY COUNTS

The close relationship between education and creativity should be obvious. So should be the relationship between creativity and freedom. In the Humboldtian tradition creativity is the goal of all educational efforts and freedom is its foundation. Humboldt had a point when he said that costly state-run educational facilities cement uniformity because government would invariably limit the scope of education to a narrow goal, such as the building of a national identity or the reduction to education as a vocational investment to train future workers.

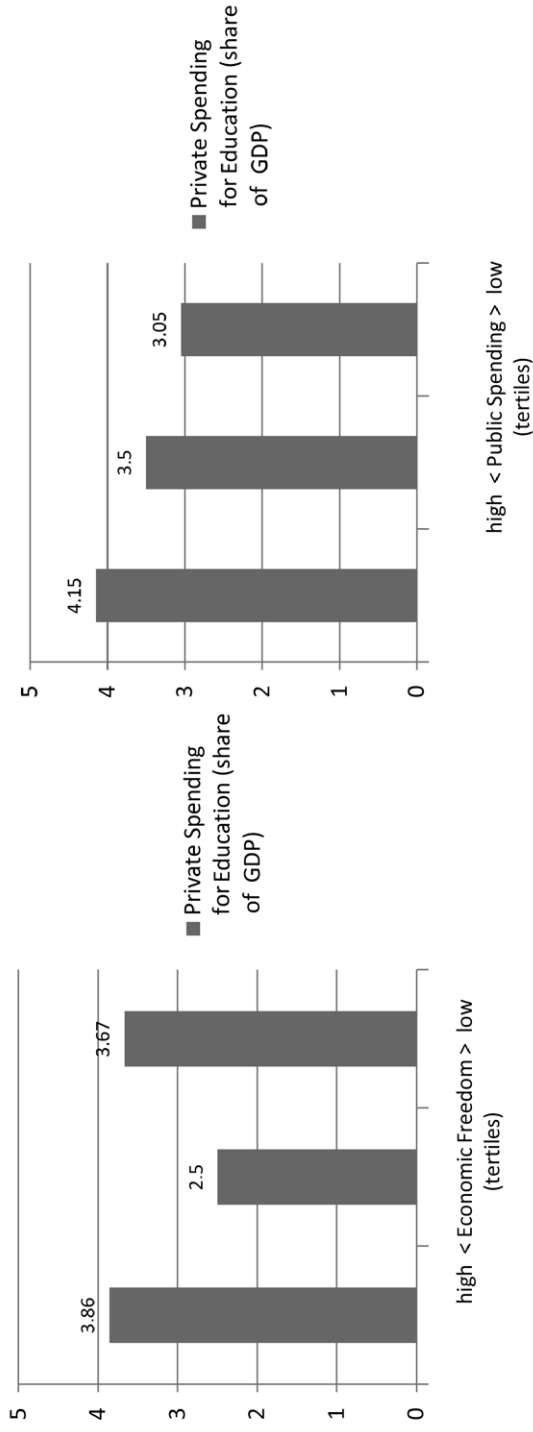
Luckily, there is an index that measures creativity as much as it can be done. The “Global Creativity Index” is published by the Martin Prosperity Institute at the University of Toronto. It “is a broad-based measure for advanced economic growth and sustainable prosperity based on the three Ts

Figure 2. Money or personal freedom?



Source: Human Freedom Index 2016 OECD/PISA 2016 OECD Data Education Spending

Figure 3. Private spending for education



Source: Economic Freedom of the World 2016 OECD Data Education Spending

of economic development—talent, technology, and tolerance. It rates and ranks 139 nations worldwide on each of these dimensions and on our overall measure of creativity and prosperity⁸. The data include, among others, the share of the creative sector in the workforce, investment in research and development, and degree of tolerance. They are on a scale from 0 (no creativity) to 1 (high creativity). “Countries that score highly on the GCI have higher levels of productivity (measured as economic output per person), competitiveness, entrepreneurship, and overall human development”⁹.

If you correlate the GCI data with PISA performance, the outcome is predictably clear (Figure 4). The higher the PISA score, the higher the creativity in a society. This must not be taken for granted. PISA is not a measurement of education in a Humboldtian sense. It is about the basic “technical” skills such as reading, writing, and calculating. Those are pre-conditions for creativity rather than creativity itself. However, creative people seem to care about the pre-conditions of their creativity when they are free to do so [See Figure 4].

FREEDOM UNLEASHES CREATIVITY

If this were the case, there should be a strong and solid correlation between creativity and economic/personal freedom. Let us begin with economic freedom by examining the correlation between how much more creativity is to be found in economically free countries and how much less creativity in economically unfree countries, as well as government spending on education (Figure 5). The difference between the effects of economic freedom and government spending is particularly visible in the highest-ranking groups [See Figure 5].

⁸ <http://martinprosperity.org/content/the-global-creativity-index-2015/>

⁹ Ibid.

Politicians cannot spend people into creativity. But they can *leave them alone*, that is, give them economic freedom. That lack of action does a lot to enhance people’s creativity simply by giving them more opportunity to develop it.

What about personal freedom? The Human Freedom Index may give us the answer [See Figure 6].

Personal freedom, too, enhances creativity, as most people would expect. As can be seen, the amount of creativity that stems from personal freedom is slightly bigger than the one that correlates with economic freedom – particularly in the top level.

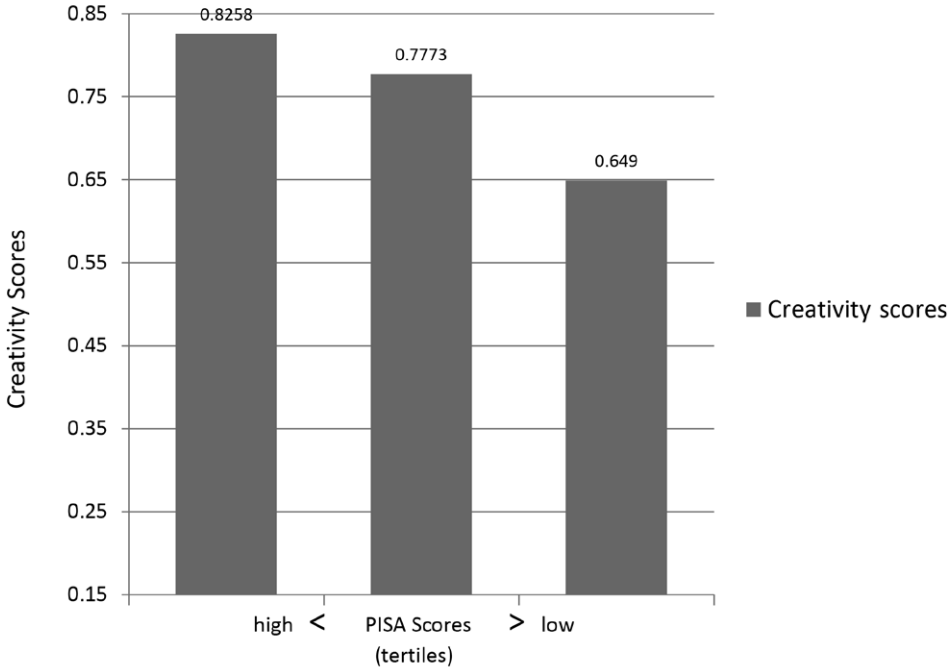
Again, one must not over-estimate this because it is within the statistical margin. Thus, it may only vaguely suggest that personal freedom is more relevant here than economic freedom. Intuitively, one would expect that the pressure of competition generated by economic freedom would pull people into more creative efforts, but it might be personal freedom that pushes them. This could be a research topic for the future, whether the carrot or the stick work better in education. The best option that comes to mind would be not to distinguish too much between the two freedoms and look at freedom as something indivisible.

ENTER, HUMBOLDT!

With this in mind, we may return from the world of empirical data to the Humboldtian ideal of education. In 1792, he wrote in *Limits of State Action*:

“The true end of Man, or that which is prescribed by the eternal and immutable dictates of reason, and not suggested by vague and transient desires, is the highest and most harmonious development of his powers to a complete and consistent

Figure 4. Education and creativity



Source: OECD/PISA 2016 Global Creativity Index 2015

whole. Freedom is the first and indispensable condition which the possibility of such a development presupposes¹⁰.

Humboldt's political philosophy is based on the idea that education should not make humans conform to the state, but rather that it is the state that should conform to humans, their creativity, and freedom¹¹.

Although an idealistic thinker like Humboldt would not have adopted the empirical and data-driven approach that has been in this article, the data seem to support his basic assumptions. Freedom

in a society may, indeed, be a substantial element of educational performance in a given country.

Since freedom usually goes hand in hand with other elements of human well-being, one may worry that, recently, it seems to be so much in decline. Creativity, openness, and development are not easily attained or preserved.

CONCLUSIONS

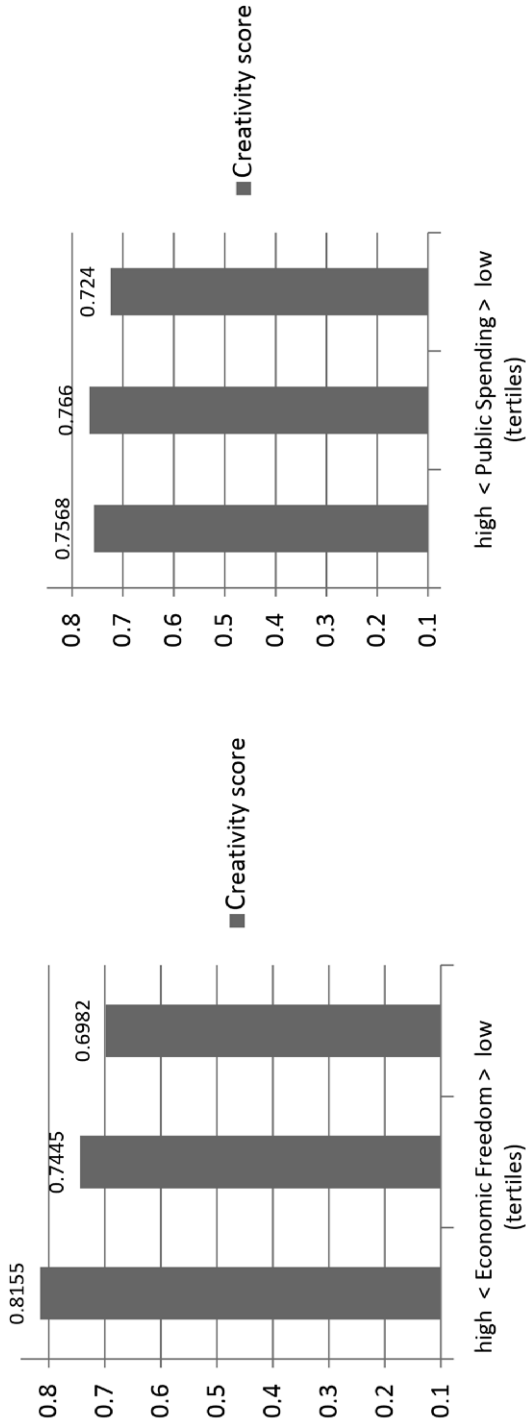
The data have shown that it is not necessarily the extent of private spending (as opposed to government spending on education) that has the greatest impact on the improvement of educational performance.

This must not be misunderstood as a call to reduce government spending on education. In many cases that would do harm. Even less so should it be seen as

¹⁰ Von Humboldt, W. (1993) *The Limits of State Action*, (ed.) J.W. Burrow, Indianapolis, p.10.

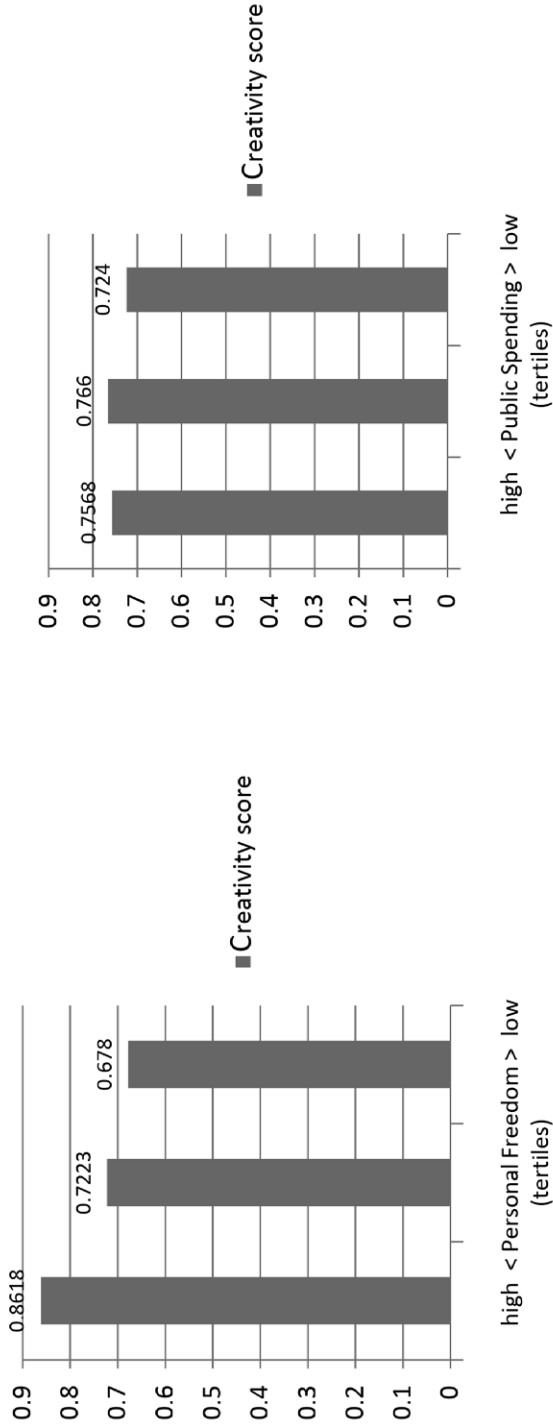
¹¹ Every challenge and every form of human interaction, according to Humboldt, has an educational effect. All this is beyond the grasp of bureaucratic state structures.

Figure 5. Economic freedom and creativity



Source: Economic Freedom of the World 2016 OECD Data Education Spending 2016 Global Creativity Index 2015

Figure 6. Personal freedom and creativity



Source: Human Freedom Index 2016 OECD Data Education Spending 2016 Global Creativity Index 2015

a plea to abandon all efforts to improve the organizational side of education – not by limiting educational freedom, but by creating a legal framework for more school choice and for private institutions to work independently. The Humboldtian ideal, if carried to its end, means that genuine education should be a matter of self-organization instead of uniform regulation. There is no reason to believe that anti-liberal one-size-fits-all solutions are the best way to improve education. In his time, Humboldt was so radical that he once said that education was “wholly beyond the limits which the State’s activity should properly be confined”¹². To him, state action (even if carefully handled) stood for uniformity instead of freedom and creativity.

However, if educational performance is to be improved in a country, it cannot be sufficient to focus on narrow questions of educational reform. Rather, the whole perspective of a country’s political direction has to be considered. A more free education is just a part of this direction.

There is more to be done. It is about the way society as a whole is constituted. Much good may be achieved if government sets a proper framework for freedom and creativity to do their work in all spheres of life.

It may rightly be concluded that a high degree of freedom in a society – be it economic and/or personal – makes humans more creative and more likely to educate themselves or strive for more education. The lack of freedom thwarts human ambition and leads to poor educational performance. And this lack of freedom cannot be compensated by

throwing more money into a system which *per se* is in many ways an obstacle to better education.

Hence, the hypothesis of this article is that the quality of the educational system is in many ways shaped by the inherent quality of the society it is operating in. A society where freedom is appreciated most highly may turn to more private initiatives or may organize itself as “civil society” to improve the educational system, even if it is government-run.

Therefore, the ideas of Wilhelm von Humboldt are as relevant today as they were in his time. ●



*

DETMAR
DOERING

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¹² Von Humboldt, W. (1993) *The Limits of State Action*, (ed.) J.W. Burrow, Indianapolis, p.52.

A Vision
of a Fundamental
Reform
of the
Educational
System
in Slovakia
(And Elsewhere)



*

JAN
ORAVEC

One of the crucial problems in Slovakia – and elsewhere – is an educational system (especially its primary and secondary levels) failing to adapt to the challenges of modern society. There is one ultimate reason behind it: the prevailing central planning approach has resulted in rigidity, bureaucracy, and purely formalistic requirements disconnected from the real world.

Therefore, it is not enough to fine-tune the existing system. It must undergo a fundamental reform in its funding and teaching content (curricula), and include proper incentive structures for all stakeholders: students, parents, education providers, policymakers, and politicians.

Rather than design a new system of primary and secondary education using a top-to-bottom approach, it is preferable to define conditions within which the new system would evolve as a result of the actions of all relevant stakeholders. Thus, a successful vision must design new incentive structures that encourage the desired outcomes: increased flexibility, diversity and higher quality in provision of

educational services, responsibility of “consumers” of educational services, and less rigidity from politicians and policymakers. Let us take a look at a brief description of the current system and its major weaknesses.

MAJOR WEAKNESSES AND FAILURES OF EDUCATION SYSTEM IN SLOVAKIA

Slovakian system is based on 10 years of compulsory education provided by primary schools (for students from ages 6-15) and secondary schools (for students from ages 15-19); a pre-primary stage is non-compulsory, with nursery schools (ages 0-3) and kindergarten schools (ages 4-6).

The school year is organized into two semesters, starting in September and ending in June, with five to six teaching lessons daily from Monday to Friday, two months of summer holidays in July and August, and one week of winter holidays in February.

It is mostly a state-run system funded from taxpayer money and provided to them for “free” with a chronic lack of funding as a result of

PRIMARY AND SECONDARY SCHOOLS IN SLOVAKIA

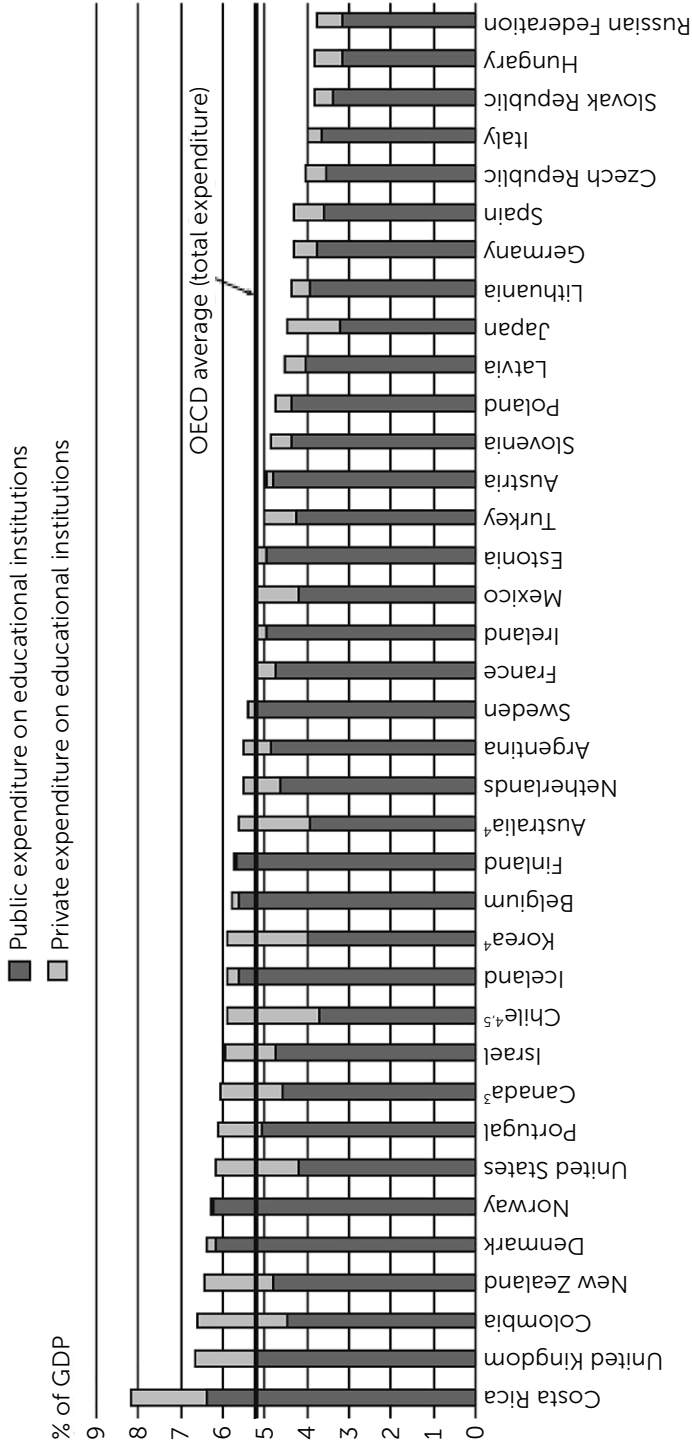
Primary school education is divided into two stages, with the first one for all children ages 6-10 and the second one for ages 10-15, where kids and their parents decide to stay in a nine-year primary school or opt for an eight-year gymnasium.

Primary education consists of a wide range of subjects: Slovak language and literature, foreign languages, mathematics, geography, history, religion or ethics, biology, chemistry, physics, music, and drawing, with a long tradition of after-school classes of music, theatre, technical education, etc.

Secondary schools provide four years of general, non-vocational education (four- or eight-year grammar schools or high schools called gymnasiums), or various types of vocational education.

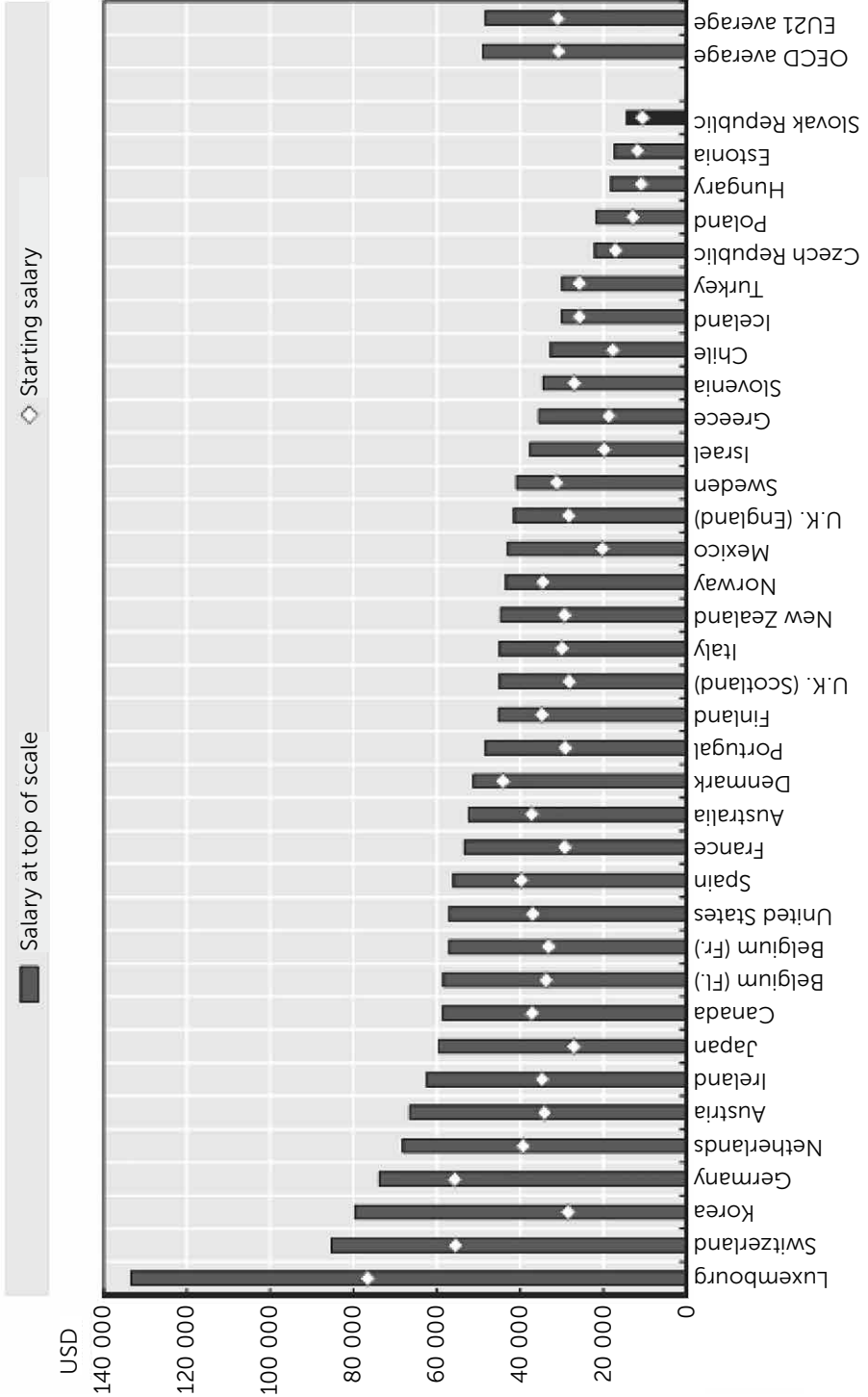
While gymnasiums prepare students for their next stage of studies, mostly at the university level, secondary vocational schools and apprenticeships and craft centers train young people ages 16-19 for the labor market.

Figure 1: Public and private expenditures on education in Slovakia in 2013



Source: OECD, Reviews of School Resources: Slovak Republic 2015

Figure 2: Teacher annual salaries at start of career and at top of the scale, lower secondary education, public institutions in Slovakia in 2012



Source: OECD, Reviews of School Resources: Slovak Republic 2015, p. 180

Table 1: Inefficiencies in the provision of educational services in Slovakia

	2003	2008	2013
Number of schools			
State	2 272	2 090	2 003
Private	11	34	42
Church	104	113	114
Total	2 387	2 237	2 159
Number of students			
State	554 986	436 077	399 760
Private	503	3 066	4 874
Church	25 302	22 572	22 743
Total	580 791	461 715	427 377
School size			
State	244.3	208.6	199.6
Private	45.7	90.2	116.0
Church	243.3	199.8	199.5
Total	243.3	206.4	198.0
Class size			
State	21.3	19.7	18.5
Private	12.0	14.6	14.2
Church	21.1	19.3	18.2
Total	21.3	19.6	18.5

Source: OECD, Reviews of School Resources: Slovak Republic 2015, p. 48

political decisions, which generates serious imbalances (e.g., the number of schools, teachers, and students) and struggles to adjust quickly.

The whole system is organized around interests of education providers (schools and teachers), not around the educational needs of individual students. Students are not seen by providers as their "clients".

It provides a "mass education", that a uniform and overloaded teaching content, is unable to tailor education to the specific needs of individual students. That creates a rigid environment that kills creativity and flexibility, the crucial assets of potential employees in the future economy.

All those shortcomings lead to one outcome: an extreme mismatch between labor market needs and the type of school graduates. Many more students go to gymnasiums than necessary and very few students opt for vocational schools, which results in a vast shortage of employees with technical skills.

TRANSITIONAL NEGLECT IN EDUCATION

After the collapse of communism in 1989, all post-communist countries were busy with a transformation of their political and economic systems. Politicians – with unequal pace in different countries – introduced democratic political institutions and

liberalized their economies. However, the so-called “soft sectors” (primarily social security, health care, and education) remained more or less untouched even by the most reform-oriented governments.

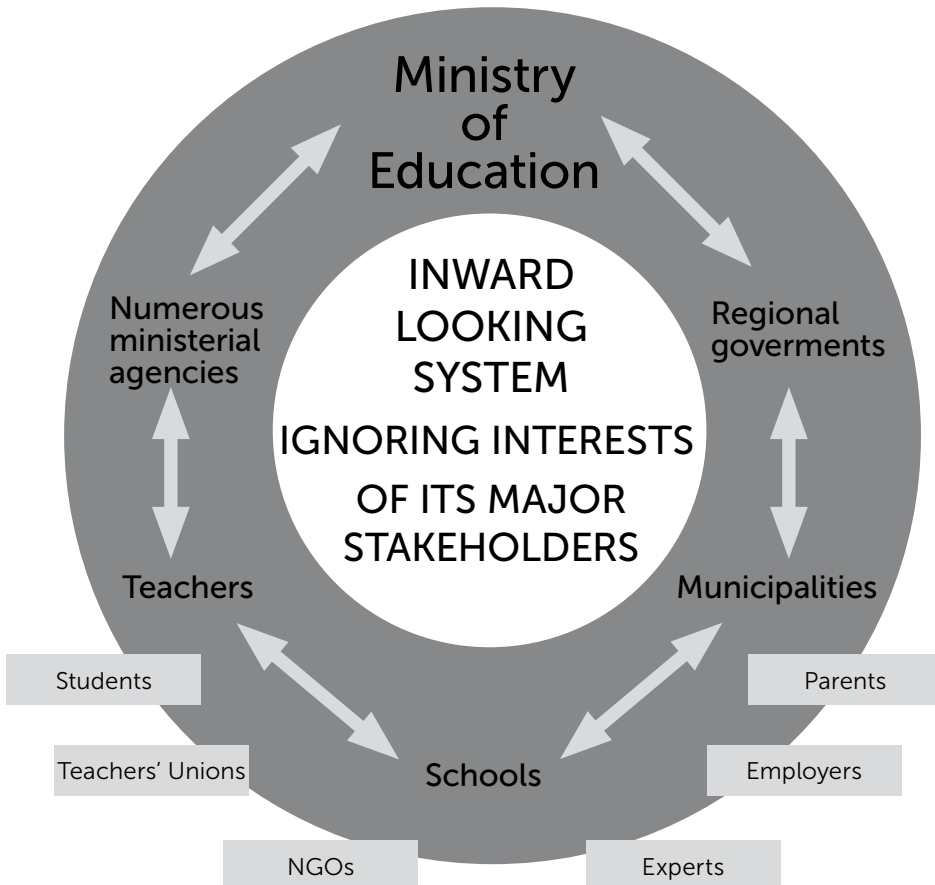
The education system is a long-discussed topic in Slovakia. It is a common belief that all governments after 1989 failed to modernize it. As a result, many serious problems accumulated over more than 25 years, including poor remuneration and motivation of teachers, a lack of freedom of schools in the teaching process, an excessive bureaucracy, and too many elements of a central planning.

OECD: “MINOR MODIFICATIONS RATHER THAN A MAJOR OVERHAUL” IS NEEDED

Since 2000, Slovakia is a member of the Organisation for Economic Cooperation and Development. Based on international comparisons, it has a positive view on the functioning and performance of the school system in Slovakia. In its recent analysis, the OECD even stated that “it needs minor modifications rather than a major overhaul”.¹ That assessment applied to how Slovak education is funded.

¹ OECD (2016) *Reviews of School Resources: Slovak Republic*, p. 15.

Figure 3: A vicious circle of government bureaucracy





TEACHERS IN SLOVAKIA ARE AMONG THE WORST PAID IN THE OECD

However, it seems that it reflects the position of the OECD toward the Slovak school system in general.

Nevertheless, the OECD raises criticism of several aspects of the Slovak education system, including low public expenditures on education, low teacher salaries, and inefficiencies in the provision of educational services [See Figure 1].

In 2011, less than 5 percent of the GDP was spent on educational institutions in Slovakia. It is the second-lowest figure among OECD countries after Hungary [See Figure 2].

While teachers in the OECD earn, on average, between 77 percent and 89 percent of the salary of a tertiary graduate, teachers in Slovakia are earning less than half of the salary of a tertiary graduate. It means that teachers in Slovakia are among the worst paid in the OECD [See Table 1].

Inefficiencies in the provision of education services can be clearly seen from the Table 1. Between 2003 and 2013, the number of students at a basic education level declined from 580,791 to 427,377 – 26.4 percent. However, the number of schools only declined by 9.6 percent. The mismatch is even more striking at the secondary level: the number of students declined by 23.3 percent while the number of schools in

the same period increased by 10.3 percent. These inefficiencies are caused by a lack of rationalization in the school system in response to demographic changes. Schools are not adjusting to the number of students.

Those – and many other – negative features of the current educational system in Slovakia did not discourage the OECD from its overall positive assessment in its review. Why? It gives high credit to two older changes that significantly affected the functioning of the school system: a partial decentralization in 2002 and a school funding reform in 2003. In 2002, due to a broad reform of public administration, municipalities gained more responsibility for the governance and management of pre-primary and basic schools and eight newly established regions gained more responsibility for upper secondary schools. In 2003, school funding on a per-student basis was introduced when a budget for each school became dependent on the number of students at the school, the school type, and other parameters defined by the legislation.

While the changes represent a partial improvement they are inadequate as a justification for the existing status quo and result in policy recommendations that are limited to a fine-tuning of the existing system.

OECD IS WRONG: SLOVAKIA NEEDS A FUNDAMENTAL EDUCATION SYSTEM REFORM

It is not enough to argue that the educational system in Slovakia is more or less an average system among OECD countries. School systems of the majority of OECD countries are struggling to keep pace with ever-changing requirements in labor markets as well as the latest developments of information and communication technology. It is not enough just to compare one educational system to



others. It must confront future challenges which will require much more focus on student needs, increased flexibility, continuous improvements, and innovations in teaching content and processes. The opposite characteristics prevail in the current Slovak educational system: an inward-looking system with too much centralization, an enormous bureaucracy, and a flawed incentive structure for all stakeholders.

Every education system is a complex world with different stakeholders: politicians, government officials and a dedicated ministry; various government educational agencies, students, parents, and employers; schools, teachers and their unions, numerous NGOs, researchers, etc. Unfortunately, it is not organized around the interests of its most important stakeholder – the students. The system is inward-looking and self-centered. Its major organizational principle is supremacy of the needs of educational infrastructure over the needs of its “clients”. Students, parents, and employers are, in fact, marginalized by the current educational system in Slovakia [See Figure 3].

STILL TOO MUCH CENTRALIZATION

There are three levels of administration of the school system in Slovakia: the central government, regions, and municipalities. The central government still holds the key regulatory role via the Ministry of Education. It is responsible for national education policy, defines the levels and terms of funding (including teachers’ salaries), manages the register of schools and school facilities, establishes the framework for student learning objectives, sets the requirements for competence of educational staff, etc. Regions and municipalities are responsible mostly for the provision of public education services.

Looking at the flow of funds [See Figure 5], decisions made on financial resources, teaching content and process, human re-

sources and the types of policymaking, it can be only said that there is still too much centralization in the Slovak educational system.

STILL TOO MUCH BUREAUCRACY AND RIGIDITY

A “troika” of authorities (the central government and its agencies, regional governments, and municipalities) brings to the system too much politics and bureaucracy, as well as a slow response to the changing environment. Moreover, it generates rigidity and kills flexibility.

Two good examples are two “monster” projects (both inspired and funded by the EU): “the national system of qualifications” and “the national system of professions”. It is a response to a real problem, a serious mismatch between knowledge and skills of graduates and the requirements of employers. Despite the fact that social partners at a central level are involved, all efforts and tens of millions of euros spent have no relevance for students and their parents, schools, or teachers. Since it is financed from EU funds, it is unnecessarily expensive. Bureaucratic exercises have continued at a central level for almost a decade without any tangible results.

In the meantime, the state as a regulator generates many rules and regulations imposing a serious administrative burden on schools and teachers which is neither necessary nor needed. Teachers are obliged to fill out multiple reports on teaching process, collect data for statistical purposes for various agencies, conduct administrative duties unrelated to their schooling activities, e.g., reporting to health and safety regulators, etc.

PERVERSE INCENTIVE STRUCTURE

One of the major weaknesses of the current education system in Slovakia is its perverse incentive structure for almost all

stakeholders involved, which is either encouraging them to do undesired behavior and/or discouraging them from desired behavior. Teachers can serve as an illustrative example. The current system failed terribly in providing adequate financial reward to teachers as discussed above. In addition to low salaries, there is almost universal consensus in society that their social status is very low and still declining. In the past, it was a respected profession. Today, not anymore. It is not financially attractive for young people and therefore the teaching workforce continues to age at a high rate. A significant number of school teachers in Slovakia are now over 50 years old.

Given this serious situation, it is not surprising that teachers have all incentives to focus almost exclusively on one single issue: the need to rapidly and radically increase teachers' salaries. However, while this matter undoubtedly is important, there are many other equally important problems which receive much less or no attention in policy debates.

Students are another crucial stakeholder who are not incentivized properly. They should be at the heart of the system, its efforts and attention, its ultimate goal – yet, they are not. Their possibilities to correct this failure are extremely limited. There is almost no direct way for students to influence the flow of funds within the system. They are encouraged to stay passive. And they accept this role of the most inactive element of the education process. At this point, it is not enough to introduce “minor modifications” into education. It is necessary to conduct a major overhaul of funding (more autonomy in financial decisions for students and their parents), teaching content (significant reduction in curricula overload of unnecessary information), and proper incentive structures for all stakeholders, students, parents, providers of ed-

ucation, policymakers, and politicians (i.e., introduction of real competition among providers of education).

THE SLOVAK EDUCATION SYSTEM: A NEW VISION

It is important to emphasize that the educational system is complex and involves many different players and institutions with complicated procedures and processes. Thus, a successful vision of the fundamental change should rely more on new incentive structures that encourage required outcomes and less on direct interventions from politicians and policymakers.

THEORETICAL BACKGROUND

The theoretical principles on which reform is based consider state intervention (ownership of assets, direct provision of goods and services, regulation) as a negative factor. This leads to a serious distortion of market coordination, the creation of privileged groups dependent on public spending, near elimination of competition, a lack of financial resources, inadequate provision of goods and services provided by the public sector, and the reduction of entrepreneurship, creativity, and personal responsibility.

THE CONCEPT OF DEMONSTRATED PREFERENCES

The first foundations of the concept of demonstrated preferences were laid down by early Austrian economists such as William Stanley Jevons, Irving Fisher, and Frank Fetter. It was fully developed by Ludwig von Mises. The idea is based on the assumption that “human preferences are reflected, thus being demonstrated by their real decisions when making choices”². Thus, if a person is attending an educational institution for five years and he or she pays opportunity

² Rothbard, M. (2001) *Ekonomie státních zásahu*. Praha: Liberální Institut, p. 18.

costs in terms of lost earnings not generated from the labor market, it can be assumed that the action was preferred over another alternative. By this decision, people demonstrate their preferences in given conditions.

THE THEORY OF HUMAN CAPITAL

The theory of human capital was developed by 1992 Nobel laureate and economist Gary Becker. Education and various courses, which are considered to be capital, make an individual more attractive in the labor market by improving his or her social status over a lifetime. Therefore, economists consider investing in these goods as investment in human capital. Education has an impact on earnings and social position, improves the quality of life, and provides orientation in economic life and social environment.

EDUCATION IS NOT A PUBLIC GOOD

The economic concept of the theory of public goods³ is more than debatable. It is accepted by most scholars without reservation for "goods" such as national defense or law enforcement. In education, this theory cannot be applied. According to David B. Johnson, "Education is clearly private good, because particularly those who receive education benefit from it and those who do not pay tuition may be denied to consume it. A country would have more technicians, journalists, doctors, or lawyers even if there were no public schools"⁴.

There is another significant problem, this time related to information: provision of education through public expenditure and its coordination by civil servants. In coordinating education policy, the public sector

does not have information on what people really need or what is good for them. Or rather, this information is obtained with a considerable delay. At the same time, the public sector – in its political process – cannot flexibly respond to changes in consumer preferences that are, in the case of education, based on labor market needs.

PROFIT AND MARKET PRICE SYSTEM MUST BE AN IMPORTANT PART OF THE EDUCATION SYSTEM

Profit. This term makes a considerable number of people angry. As Henry Hazlitt says, "It is an indication of how little is understood a role profit plays in the economy."⁵ It is absolutely essential for any sector to have an opportunity to generate profit. In short, we can say that the main function of profits for businesses is to provide them with information on customer satisfaction, or whether their efficiency corresponds to the optimal utilization of resources. From an economic perspective it can be argued that the profit a) is one of the coordinators of the behavior of individuals in the market and b) motivates the search for better opportunities of satisfying consumer needs. With the price mechanism, we can calculate our costs and thus profit.

Problems arise wherever – including education – there are no market-determined prices of goods and services, i.e., where there is no system for individuals to value goods and resources as compared to other available resources. We can characterize them as a) underfunding, b) lack of understanding of needs of individuals and the labor market, and c) the absence of a flexible system that would determine how to teach, what to teach, and in what quality and form, what is the optimal number of students per teacher, how many training facilities should exist, etc.

³ I.e., goods that are available to everyone and are non-rivalrous.

⁴ Johnson, D.B. (1997) *Teória Verejnej Volby*, Bratislava, Sofia, p. 114.

⁵ Hazlitt, H. (1999) *Ekonomie v Jedné Lekci*. Praha: Liberální institut, p. 154.

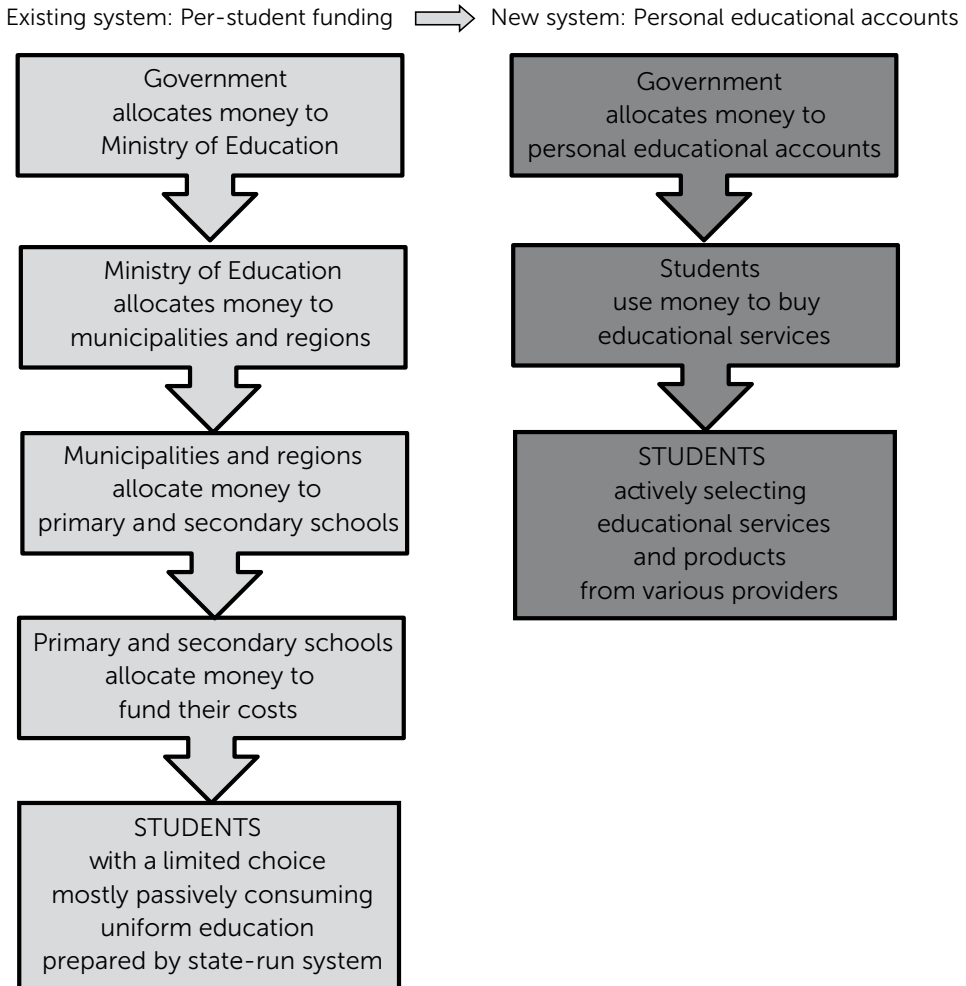


The market price mechanism not only generates all that information, but it also guarantees an optimal funding for education. Without the price system we are economically blind. Market forces can be introduced to state-run education relatively quickly even without complete privatization: simply by giving students (and their parents) freedom to choose the school they want to attend or the educational product they want to buy.

ALLOWING COMPETITION – FREE ACCESS TO INDUSTRY

An absolutely necessary condition for market prices of education is competition, which, according to the Austrian School of Economics, shall be defined as free entry to the sector. This means no strict regulatory measures from the authorities. From this definition it can be assumed that competition is not only the actual provision of the goods or

Figure 4: A paradigm shift in funding



services to other businesses, but it also poses a threat in terms of the supply of these goods or services by other competitors in that market.

For a regulatory policy, there should be one overarching imperative: as few restrictions as possible when it comes to teaching content (with a few basic requirements: reading, writing, and calculating, and stakeholders deciding the rest), ways of teaching, and providers of education (innovative and diverse approaches should be welcomed, with minimum requirements for entry).

SECURING INDIVIDUAL RESPONSIBILITY FOR EDUCATION

It is important to emphasize that decisions on education of children should be made by individuals, namely students and their parents, not by the government. State educational policies created by politicians and bureaucrats that determine “what to teach” and “how to teach” undermines the role of the family, the rights of individuals, and their personal responsibility. State paternalism in this area is probably based on the belief that the government officials are the most competent to decide how the education system should look like on behalf of the interests of society. This argument, however, is incorrect and immoral. Each person is exceptional and unique. Therefore, they have the right to make decisions concerning their life and future.

FUNDAMENTAL PRINCIPLES OF THE VISION OF EDUCATION SYSTEM IN SLOVAKIA

From underlying theoretical assumptions, it is possible to derive a set of fundamental principles of the vision. They can serve as a foundation for recommendations on how the new system should look:

- It must include as many economic incentives as possible that allow its stakeholders the maximum flexibility in order to adapt to ever-changing conditions;

- Parents (of the most) of the children and the children themselves have to be empowered. They will need to play a crucial role in the education system, associated also with a greater responsibility for decisions in the education of children;

- There must be a significant shift in funding – from financing of educational infrastructure (schools) to the financing of educational services;

- New funding must be based on a system of personal educational savings accounts administered by parents; each student must be seen as unique. Therefore, the education system must be designed along the lines of his or her educational needs;

- The system must guarantee universal access to education for all children;

- The public administration has a position of the guarantor of the functioning of the system of control over compliance with generally specified conditions, social security, and so on;

- The education system must respond to new technological trends like social media, free online courses, cloud technologies, mobile learning applications, etc.

Those principles can then be formulated into the following policy recommendations covering three major pillars of the vision.

NEW PARADIGM OF EDUCATION FUNDING: PERSONAL STUDENT ACCOUNTS

The aim of introducing per-student funding was to increase transparency and efficiency in financing primary and secondary schools. This goal was only partially fulfilled. Moreover, the Slovak Ministry of Education gradually complicates the system. Today there are 24 different ways of

calculating per-student funding for secondary schools as a result of modifications to the original formula. It is clear that there must be a significant shift in funding – from financing of educational infrastructure (schools and teachers) to financing of educational services. This can be achieved by introducing a fundamental change in the flow of financial resources within the system. The financial resources for education need to be allocated directly to students' personal accounts instead of circulating money within educational structures. Namely, from the Ministry to municipalities and regions, from municipalities and regions to primary and secondary schools, and from schools to teachers to cover personal costs of education, and from schools to providers of electricity, heating, etc. to cover operational costs. Even from this brief description it is clear that somebody and something important is missing here: students and their educational needs.

In order to bring students into the center of the system, the old way of funding must be eliminated and replaced by the new way of funding where financial resources for education are allocated directly to the personal accounts of students. Students – and parents of students under 18 – would be able to pay for education directly from their personal account. It would simplify

the whole system on one side and give the transparent control of cash flows and decision-making directly to the people [See Figure 4].

Such a personal student account may take the form of a bank account, credit card, or on-line government account. The final decision of which form to opt for needs to be made after a careful consideration of simplicity, user friendliness, flexibility, and other criteria. In the future, even crypto systems (smart contracts and crypto-currencies) with defined properties of finance might also be used.

Amount of the allocation to the personal accounts would be calculated as follows:

Amount of the allocation per student = (Total amount of resources for education - total amount of state and social grants - overheads) / Number of children between ages 6-19

After feeding this formula with data, the total amount of annual allocation per student would be equal to about 2,000 euros.

Furthermore, a student's personal account would receive allocation in regular time intervals (e.g., quarterly). There would be a possibility to spend money only on defined services or products with a license. That should limit fraud. However, since the licensing can potentially

Figure 5: Centralized versus decentralized systems

	Centralized system	Decentralized system
Hard policy making	Bureaucracy Prescription and control of activities Standardized resources (qualifications) Mandatory provision	Setting of mandatory goals Obligatory control of results
Soft policy making	Mobilizing commitment, engagement	Market Self-organization, autonomous activities Flexible resources, acquisition Intervention through incentives, sanctions

have a damaging effect on the supply side and its flexibility, it needs to be an easy, speedy, and light procedure with minimal eligibility criteria to support competition and diversity of educational products and services.

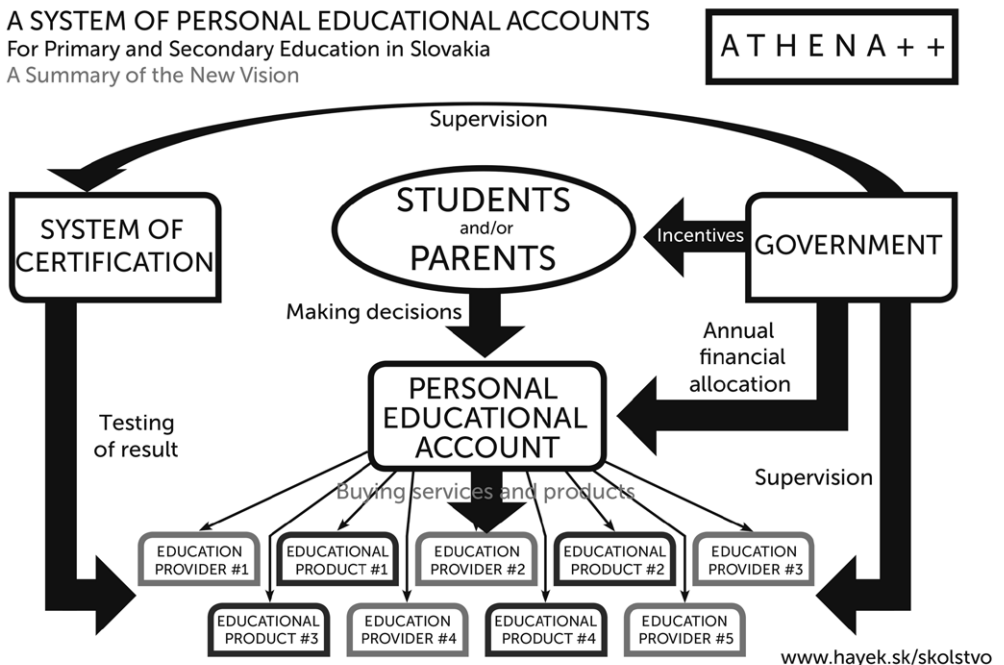
There would also be a possibility of saving money if parents and/or students were able to purchase cheaper education by opting for the most favorable combination of value from all available alternatives. Savings could be used to finance education of students in the future, including higher levels of education, lifelong learning, etc. These financial resources would be owned by students and that is why they ought to be inherited. This model combines ideas of educational voucher

systems with personal savings similar to the system of individual pension accounts currently existing in Slovakia and many other countries in Europe and in the world.

OPENING A PROVISION OF EDUCATIONAL SERVICES: MORE FLEXIBILITY, DIVERSITY, AND HIGHER QUALITY

Nowadays we live in a world where everybody is confronted with constant change. Labor markets require utmost flexibility. The abovementioned financing system would allow more freedom for the education of children. If introduced, it would change the motivation and functioning of the schools themselves because a competitive environment would be created. It

Figure 6: A vision of the decentralized system of primary and secondary education in Slovakia



would push education providers to come up with attractive learning models for better prices and better adapt to the labor market.

In principle, anyone would be able to get an educational license – schools, teachers, individual entrepreneurs, freelancers, institutional investors, NGOs, etc. In order to promote diversity, the state should require certain standards in limited areas (writing, reading, and mathematics); otherwise, it should deregulate the curriculum.

In the new system, it would make no sense to divide schools into different types – the school becomes a center of learning which can be extremely specific (from one-sided focus on various aspects such as age, course content, or the form of training) to extremely diverse (courses offered to different age groups). The cost of education would be set up by licensed subjects themselves. Teachers would face competition from other teachers and other education providers.

This can be a cause of concern for many. What about a risk of a “race to the bottom” in terms of price and quality? Those concerns can be addressed effectively by the third fundamental pillar of the new system: a rigorous and thorough evaluation of quality.

EVALUATION OF QUALITY: SYSTEM OF CERTIFICATION

The last important area is testing the results of education – certification of competencies, which should go to specialized bodies that deal with measurement and evaluation. The certification body would be able to carry out its activities only upon obtaining a license. Various institutions (like universities, businesses, or business associations) would be eligi-

ble. There would be many types of certificates accepted, by foreign entities, the labor market, colleges, basic state certificates, etc.

In terms of public policy, state focus would be on the testing of certain universal skills and knowledge such as writing, reading, and mathematics.

The form, content, and cost of the certification itself would be determined by evaluation bodies. Certification would be an eligible cost for students and he or she could use their personal student account to cover it.

Of course, many questions may arise. How quick would be a transition from existing system to the new system of education? How would the new system protect against fraud? What about students from poor social environments, children without parents, and abandoned kids? Answers to those and other questions, together with a more detailed description of the changes and proposed implementation (the most important elements of the new design of the education system in Slovakia), can be found on a web page of The F. A. Hayek Foundation. It is impossible to foster economic growth and enhance productivity without education systems tailored to the needs, requirements, and challenges of the 21st century. And visions like the one presented here make it possible.

In order to give the reader a better idea of the whole vision, it is useful to summarize all its important elements in one graphic [See Figure 6].

CONCLUSIONS

The current educational system in Slovakia does not please anyone. Teachers are frustrated by low salaries, parents are unhappy with declining quality of schools (as measured by international comparisons

like PISA), employers are unable to find enough skilled people on the labor market, and politicians always confronted with other policy priorities.

There is a general consensus that, after decades of ignoring its problems, this segment of society needs to go through a fundamental reform that would make it fit for challenges of the 21st century.

However, there is almost a vacuum when it comes to suggestions for what should be done and how, exactly, the educational system needs to be changed. Teachers' labor unions, political parties, employers' organizations, NGOs, various experts — they all have in common a bold criticism presented from their particular points of view, and at the same time have no reform plan.

The new vision of the Slovak primary and secondary education presented here is the first comprehensive proposal on the need for a far-reaching overhaul of the system and how it should be changed.

It is based on the firm belief that decisions about education should be made by individuals, not by the state. It is therefore trying to propose measures maximizing freedom and responsibility of individual students and their families to make decisions on which educational services and products to buy that would be best tailored to their needs.

The proposal presented in this article is not as radical as it might sound. It does not eliminate the existing system of publicly funded education. Its main part is a proposal to shift decision-making powers over taxpayers' money to be spent on education. Until now, politicians and government officials were in charge. From now on (after implementation of this vision) "consumers" or "clients" (students and their parents) of

the school system will be in charge. There is also much more heterogeneity and diversity of providers of educational services and products envisaged.

The system as proposed in this text does not exist in any country in Europe or elsewhere. It is not going to be implemented tomorrow. Its main purpose is to open debate and inspire others in Slovakia (and in other countries) to adapt their educational systems to modern realities of the contemporary world with all its challenges, risks, and opportunities. ●



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JAN
ORAVEC

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How to Reform the Content of Education in Slovakia



*
RÓBERT
CHOVANCULIAK

One of the biggest economic myths is the notion that a functional, efficient, and ordered social system must be the result of conscious human design. If one found a watch, intuition would say (correctly) that it probably should be attributed to a specific designer, that it was accompanied by a detailed operation manual, and if it breaks, a watchmaker could fix it. However, people have a tendency to automatically apply ideas and knowledge from the domain of mechanical systems to the domain of social problems. They see the work of a conscious designer (a minister and his advisors) behind social order and call for their intervention when social problems appear. That, however, is a false belief.

The origins and behavior of a functional social order resemble a bird more than a watch. Both contain signs of order and purposefulness; watches keep time and fit perfectly on a human wrist whereas birds have an aerodynamic shape, hollow bones, and wings, which allow them to fly. However, there is no conscious designer of the latter. Rather, it is a result of the spontaneous power of evolution. A similar power is behind the social order.

Social order is the result of spontaneous processes comprising activities of millions of people (without them intending to contribute to this order) and does not require the presence of a central coordinating authority. Adam Ferguson observed in the 18th century that social structures are often “the result of human action, but not the execution of any human design”¹. In other words, the order does not need a planner, minister, or engineer. Nevertheless, it works as if it were designed by the best planner with

perfect knowledge and the best intentions. Evidence can be found all around us. Nobody plans the IT industry and no individual is responsible for coordinating millions of people whose decisions shape it on a daily basis. Even though there is no coordinating center and no “minister for IT,” the industry runs like clockwork. There are ever newer and better-quality products and efficiency puts downward pressure on prices. The same is true with food, cars, clothing, housing, and so on.

However, this is not the case with education today. Education systems in societies around the world have a top-down form and most people expect solutions to come from the top. When there are poor-quality schools, outdated curricula, or old teaching techniques, we expect the Minister of Education and his advisors to resolve these issues. They are the ones who will propose reforms to modernize the education system. They will legislatively define what a good school should look like, create a new curriculum, and prescribe new teaching techniques based on the newest findings from pedagogy or cognitive neuroscience. However, there is a vast gap between how idealists think they can design the system and the reality of it.

Our proposed reforms, which can potentially deal with the present problems in education in Slovakia, do not consist in prescribing exact solutions but rather in creating institutional conditions favorable to generating these solutions. We, as a society, do not need the exact answer; rather, we need an algorithm for generating correct answers in an ever-changing environment.

A decentralized model of reforms (also known as the market mechanism) is so far the best-established algorithm for gener-

¹ Ferguson, A. (1767) *An Essay on the History of Civil Society*.

ating innovations, order, and progress. Its functionality and efficiency, and the lack of a market mechanism in education, are the real reasons why the educational system is relatively behind in performance. In other words, schools changed only slightly whereas the world around them changed dramatically.

ROOTS OF THE PROBLEMS OF THE SLOVAK EDUCATION SYSTEM

The so-called “regional education” in Slovakia consists of primary, lower secondary, and secondary education. Children start primary school at six years old and go through four grades (grades 1-4). Then children continue (often in the same school) in lower-secondary education for



SLOVAKIA HAS
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the next five years (grades 5-9). Compulsory education ends in the first year of secondary education which lasts from two to four years depending on the difficulty of education.

The present shape of the primary, lower secondary, and secondary education system in Slovakia is essentially defined by two reforms. The first took place in 2003 and consists of two acts which decentralized the financing and governing of schools. The second is a content reform enacted in 2008 (by Minister of Education Jána Mikolaj) that intended to further increase the autonomy of regional education. However, as we shall see, it only entrenched the reformers’ beliefs about the shape that education should take.

Formally, Slovakia has a decentralized education system where local authorities control the financing and governing of schools. In addition, so-called normative financing, where destination of funding is determined by parents’ and pupils’ decisions, was established. In theory, that should be enough to promote competition among schools and pressure on them to improve quality. However, education remains centrally governed and primarily shaped by ideas from politicians, the Slovak Ministry of Education, and education experts from various institutes.

No matter the declared intentions of the education reforms, experts and institutions of the public sector are *de facto* micromanaging the content and form of education in Slovakia. The main documents which define the content of education in Slovakia are the State Education Programs (SEPs). They are binding for all schools and determine the general learning objectives and key competencies which education should build. They also contain compulsory core subjects which are included in all individual fields of education. Furthermore, all learning objectives and education standards are described in detail for each subject. They include specific content (what each pupil should know) and performance (what level of proficiency they should reach)

standards. Eventually, each school bases its teaching heavily on these SEPs. Thus, whoever controls the state curricula controls what is taught in schools.

Let us illustrate with an example of such micromanagement of education from the center. By the end of the first half of the fourth grade of elementary school (10-year-olds), each pupil is expected to name all planets of the Solar System in the right order, define a constellation as a visible grouping of stars with a discernible figure, identify the main constellation of the winter (Orion) and the summer (the Big Dipper), and graphically illustrate the configuration of the Solar System.

Experts from the State Pedagogical Institute (SPI) also regulate how many dictations testing pupils' writing each fourth-grader should take. Specifically in the fourth grade, 10 dictations focus on correct spelling, conjugation, and declension, among others. There is even a detailed marking scheme of the dictations in the SEP (0-1 mistake = A, 2-4 mistakes = B, 5-7 mistakes = C, 8-10 mistakes = D, 11 or more mistakes = F) and a note saying that the same repeated mistake in the same word counts as one mistake. On top of that, the length of these dictations is regulated for each grade as well.

The number of lessons that each school can dedicate to natural sciences or the Slovak language in each year is stipulated in teaching framework plans. It contains binding allocation of time to each subject for each stage of education and recommended time for each grade. For example, each fourth-grader should have two lessons of natural sciences per week. The plan also delineates the number of optional lessons which each school can specify in its school education plan. The number of those lessons was reduced by the latest



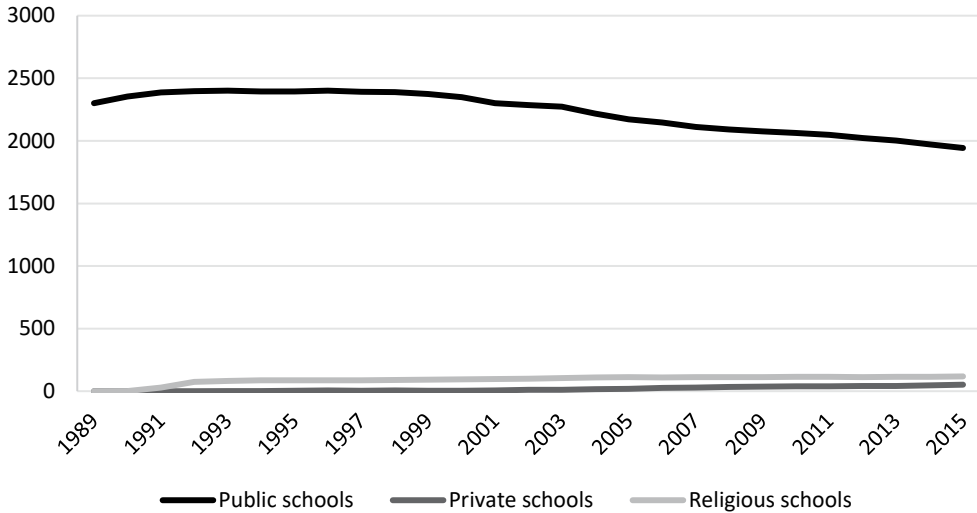
THE MINISTRY
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PEDAGOGICAL
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legislative amendment in 2014. In primary schools, the number fell from 20 lessons to eight lessons out of 96 lessons available. Therefore, schools have direct control over about 8 percent of teaching time². On top of that, the SPI recommends using the available lessons for teaching compulsory core subjects, which many schools do. The purpose of all these examples is to demonstrate how micromanaged the process of teaching is. This micromanaging makes it difficult for teachers to show their value and teach children in the best possible way – according to their local knowledge.

The Ministry of Education and civil servants from the State Pedagogical Institute decide very particular details of what children learn and when they learn it. State

² SPI 2016.

Figure 1: The number of elementary schools in Slovakia



Source: Centre of Scientific and Technical Information SR

Education Programs with teaching frameworks have hundreds of pages and each one has to be approved at an advisory meeting with the Minister of Education. Individual documents are even signed by their respective authors. These people have literally determined what hundreds of thousands of children learn every year in school.

Besides delineating how much funding goes to education in general, individual schools in particular, and how much teachers earn, the present system also specifies the maximum and minimum number of children that can be in each class, when each lesson starts and how long it takes, which subjects are taught, what is taught in individual subjects, which textbooks can be used, and what pupils in each year have to know. This micromanagement has recently been strengthened by standardized testing of all pupils in the fifth and ninth grades, which gives more control over education to the center and suppresses all experimentation.

Even though the Act of 2008 defines “experimental verification” as a possibility to test new “goals, methods, and means of education,” only a small fraction of schools make use of it. Fewer than 30 out of more than 3,000 schools participated in it during the 2015-2016 school year. Therefore, official experimentation takes place in less than 1 percent of Slovak schools. The experimentation, too, is quite constrained. According to the law, it is approved and directed by the Ministry of Education separately for each school, while each experiment has to have a pedagogical faculty or (most frequently) the State Pedagogical Institute – the authors of State Education Programs themselves – as an advisor.

Furthermore, there is limited presence of private schools in Slovakia, where the overwhelming majority of education is provided by the public sector (municipalities and self-governing regions). For example, even though the number of private elementary schools is increasing over time (Figure 1), private providers cover only 2.5 percent of

Table 1: Comparison of the centralized and decentralized models of reform

	Centralized Model	Decentralized Model
Preparation of the reform	Lasts for decades, requires long discussions	Lasts for months, requires ideas of one person
Implementation of the reform	Only one reform can be active at a given time	Hundreds of parallel reforms can be active at a given time
Feedback	Evaluation takes years, no simple interpretation of results	Evaluated within months, easy to interpret
People involved	Responsible individuals do not bear decision costs	Responsible individuals bear decision costs

Source: INESS

elementary schools today (52 in total), with the rest provided by the public sector (92 percent, 1,943 schools) and the church (5.5 percent, 118 schools).

Drafting of the schooling laws was based on the assumption that educational content has to be accurately defined by experts in the field and if anything important is left out from the law, pupils will not learn it. The law thus attempts to precisely define what children should know and at what point in time. This assumes that state officials will know everything that is important to know. In addition, it aims to define technical and organizational requirements and to outline teachers' work in detail. On top of that, ministerial micromanagement is even encroaching on school cafeterias where, for example, former Minister Juraj Draxler prepared recommended recipes containing ingredients such as tofu, bulgur, Hokkaido squash, and asparagus. The present leadership of the Ministry of Education has also initiated a fight against salt that has made salt boxes disappear from cafeterias.

Over the years, all the mentioned controls of educational content have borne its fruits in the form of incompatibility between the outside world and the world inside schools. New technologies are developed every day, production and services are modernized, jobs are changing beyond recognition, and we have access to an infinite amount of knowledge on the internet. Yet in schools, blackboards with white chalk were replaced by whiteboards with black markers and some children are given tablets, which they can operate better than their teachers. The question remains how to bridge the gap and how to ensure that education can adapt to changes in the outside world.

TWO APPROACHES TO REFORMING EDUCATION

The current level of centralization inflexibility of the primary, lower secondary, and secondary education system in Slovakia are clear reasons for its reform. The question is not whether to introduce it, but how to go about it. There are essentially two ways of reforming education.

The first is a centralized, top-down approach that produces a new design of educational content for the whole coun-

try. Its formation is based on a “society-wide discussion” and looks for compromise among diverse opinions. Politicians and civil servants fighting for voters’ support are responsible for the process. The reform is implemented through legislative action and feedback consists mostly of institutional inspections and evaluation of results several years after the implementation.

The second is a decentralized, bottom-up approach that produces new mechanisms and processes that endogenously generate new educational content. Its formation is based on decisions by individual schools that try to satisfy local demand for education. Founders and headmasters of individual schools fighting for customers’ support are responsible for the process. The reform is implemented through internal school policies and feedback consists of pupils’ willingness to attend a given school³.

The latter model operates like the model of the private economy. It produces cars, computers, food, telecommunications services, transportation, entertainment, and professional courses.

In the following section, we shall closely describe these two approaches to reforming education and show their systematic tendencies [See Table 1].

PREPARATION OF THE REFORM

Preparation of the reform in the centralized model lasts for decades. It is extremely difficult to produce mandatory educational content for the whole country and

hundreds of thousands of children. Societal debates on reforms rarely yield a single compact solution and tend to polarize opinions in society. It is hard to create a product suitable for everyone. Moreover, such a comprehensive reform requires more time than the four-year electoral cycle allows. As a result, new governments start from scratch.

Slovakia is a case in point. During the last 26 years, 18 ministers led the Ministry of Education and each of them brought their own vision and reform proposal. Therefore, a new minister was appointed, on average, every 18 months and restarted the process.

As a result, the old education law of 1976 was in force for almost another 20 years after the 1989 revolution. The new education act was passed only in 2008. The world had changed beyond recognition over these 20 years, but the educational system was frozen in the last millennium. A fresh discussion on a reform has begun recently, after almost 10 years, but it remains uncertain what the result will be and when it will be visible. Even though the present education law is regularly amended, these changes reshape the existing system only partially, which is hardly enough for keeping up with the pace of the world around us.

On the other hand, the decentralized approach to reforming education has minimal time and staff requirements for preparing the reform because it takes place on the local level and does not require society-wide discussion. The resultant reform proposal resembles a business plan in educational services.

Furthermore, preparation of such a reform is not subject to electoral cycles and political pressure. Consequently, the situation where the reform process has to start from scratch and the education system remains

³ Relative effectiveness of educational systems which embraced some of these principles is shown in A.J. Coulson’s *Comparing Public, Private, and Market Schools: The International Evidence* (2009), <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.175.6495&rep=rep1&type=pdf>



PARISH
OF ST. JACOB



EDUCATION IS A COMPLEX SYSTEM AND IT IS HARD TO ASSESS THE IMPACT OF A REFORM AND ITS INDIVIDUAL COMPONENTS ON PUPILS' PERFORMANCE

frozen for decades does not occur. We can expect prompt response of reforms to changes in the environment under the decentralized model.

IMPLEMENTATION OF THE REFORM

The main characteristic of the centralized model is the fact that only one uniform reform can be in force at any one time. Alternative reforms take place only in a series, one after another. Therefore, under such circumstances, there cannot be competition among different reforms. Such a competition exists only in the preparation stage in the form of society-wide discussion which suffers from all the problems outlined above. In the end, only one reform can be victorious.

A lack of real competition and an inefficient feedback system create an environment prone to mistakes and shortcomings. These mistakes are even more dangerous in the centralized model because they have the potential to affect all schools and hundreds of thousands of children. They

are also harder to fix because the system is so centralized and time-consuming to change. Thus, any error has potentially enormous consequences. On top of that, these mistakes and shortcomings are often hard to identify because teachers and pupils cannot compare the system with different approaches in the same country.

These deficiencies can be seen in textbook policies, which are highly centralized in Slovakia. The Ministry of Education has a monopoly over calling for tenders for new textbooks, picks the winner, and grants accreditation. The Ministry also provides distribution via a central editing portal. As a result, every September, schools lack numerous textbooks and get only excuses from the Ministry of Education (in 2016, schools received only 84 percent of textbooks they ordered). Even schools which get access to textbooks often cannot choose from different options but are forced to use the one approved textbook⁴.

On the other hand, thousands of parallel reforms can be active at any one time under the decentralized model. Real competition creates opportunities to discover new processes in education, teaching methods, teaching content, school organization, classes, and lessons. It allows people to discover the ideal mix for education.

Due to the fact that many reforms take place simultaneously, there is room for trial and error, the key component of natural adaptation of any system. The "trial" in this context means that there should not be any center dictating the who, what, how, and when of education, but that there should be freedom to attempt to satisfy demand

⁴ Čunderlíková, J. (2016) *Aktuality*, "Dodávky učebníc viaznu. Siestakom chyba geografia, druhakom matematika," September 19, 2016, <https://www.aktuality.sk/clanok/373550/dodavky-ucebnic-viaznu-siestakom-chyba-geografia-druhakom-matematika/>

for education without seeking permission. This stands in contrast to the centralized model where approaches to teaching are given to schools beforehand.

However, the “error” is even more important. Without mistakes and their identification through feedback, the innovative process would be flooded by countless ventures without the opportunity to achieve progress. Indeed, we have to let schools try and innovate freely, but we also

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IT IS A MISTAKE
TO ASSUME THAT
THE ONLY MOTIVATION
OF THE MINISTER
OF EDUCATION AND
THEIR EMPLOYEES
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SYSTEM

have to have a mechanism for discarding bad ideas and conceptions. This is the role of feedback, the integral part of which is a properly working spontaneous order.

It is important to emphasize that, when mistakes occur in the decentralized system, they do not have such tragic consequences as they do in the centralized system. Under the decentralized model, errors have only local negative effects and there

is motivation to quickly identify and correct them. That enables schools to innovate and adapt to new conditions.

The decentralized model also solves uniformity problems in the centralized system, mainly in the form of sensitive, ethical, and religious questions. There is no artificially enforced uniformity in the decentralized system, but there is large diversity in these sensitive areas.

FEEDBACK

Feedback and evaluation in the centralized model are relatively difficult. Education is a complex system and it is hard to assess the impact of a reform and its individual components on pupils’ performance. Central reforms open the space for numerous and often contradictory interpretations of results. What is more, these results can often be reviewed only several years after the implementation of the reform, which complicates the situation even further.

It is in fact possible to conduct a continuous evaluation, but it generally focuses only on adherence to the predefined processes. A case in point is the present-day work of the State School Inspection in Slovakia, which is not interested in real results of different methods but in their accordance with the State Education Program and education law.

Feedback and evaluation are much simpler under the decentralized model. Simultaneous operation of multiple reforms facilitates their comparison at a single point in time. We do not have to wait several years for results, and the room for interpretation is narrowed down by the direct comparison of various approaches in different schools.

Moreover, evaluation of these results is in the hands of individuals best suited to do it – customers. Hundreds of thousands of

parents and children judge thousands of different schools based on their services. Providers offering high-quality services attract more customers and other schools then emulate them. In contrast, schools which fail to meet the expectations of parents and children have losses and their approach to education disappears.

Of course, this type of feedback is not perfect (parents make mistakes and it takes time for low-quality schools to disappear). Nevertheless, it is a mechanism responsible for the modernization and increasing quality of basically all goods and services that we use every day. Parents make mistakes (experts on education make mistakes too), but under the decentralized model, there are self-correcting mechanisms that help parents learn from their mistakes and rectify them.

PEOPLE INVOLVED

Under the centralized model, the individual or team responsible for the reform bear limited costs of their decisions in the political market. A politician who proposes a bad education reform does not have to be afraid that pupils will stop attending their school in one or two years and they will go bankrupt. As already mentioned, evaluation of the reform takes even longer and there will be different interpretations of the outcomes. Regardless, a politician's electoral cycle lasts four years and their re-election is influenced by other factors.

It is a mistake to assume that the only motivation of the Minister of Education and their employees is to improve the education system. Politicians and bureaucrats often have their own incentives which do not necessarily coincide with the public interest. Corruption, interest groups, and clientelism are a part of the public sector, including education⁵.



THE SAME PERSON
IN THE ROLE
OF A CUSTOMER
CAN SPEND HOURS
PICKING A TOASTER
FOR MAKING
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REMAIN IGNORANT
ABOUT EVERYTHING
INVOLVING
THE MINISTRY
OF EDUCATION
AND THE EDUCATION
SYSTEM IN THEIR
COUNTRY

Furthermore, voters often do not sufficiently pressure politicians into devoting more time to improving the education system. However, this apathy of voters and politicians toward education is not a failure, but a property of the system responsible for its provision. Voters are rationally interested only in topics that affect them personally. The same

obrátky: Takto sa šafári v školstve," January 29, 2016, <http://www.pluska.sk/spravy/z-domova/skandal-pre-drazenymi-pomockami-nabera-obratky-takto-safari-skolstve.html>;
<https://www.postoj.sk/19440/preco-je-skolstvo-pre-sns-rezortom-za-miliony>

⁵ Pluska, "Škandál s predraženými pomôckami nabera



person in the role of a customer can spend hours picking a toaster for making breakfast but will remain ignorant about everything involving the Ministry of Education and the education system in their country.

In doing so, the person behaves rationally. When picking a car, the choice is decisive and binding. However, no matter how much effort they put into analyzing different education methods and the behavior of politicians, in the end it will have no impact on policy decisions in the centralized system and it will bring them no tangible benefits. One voter is one grain of sand in the desert of voters.

The situation is completely reversed in the case of decentralized reform. However, the reason for this difference does not lie in the types of people making the decisions. Reformers on the decentralized level do not have better HR managers, nor are they more determined and ambitious than people in government ministries. The difference is in the incentive structure facing the agents of the decentralized reform.

Under the decentralized model, there is a direct responsibility of all people involved. Reformers on the decentralized level experience all the benefits and costs of their decisions. They realize that if parents do not see the results of their work, they will change schools and their resources will leave with them. In contrast to centralistic reformers, they cannot afford to idle. Thus, pursuing their self-interest leads them to provide high-quality services for the consumers. That is the only way they can prosper. They will also face more severe punishment if they fail or cheat. Consumers remember people from their community or city. Politicians, however, are more quickly forgotten.

The same is true for parents and students who choose schools that they pay for (or give their education voucher) and, therefore, demand results and are interested in what the school is doing. Their decisions have a direct impact on their well-being, which cannot be said if their preferences are expressed through voting. Therefore, in the decentralized system, decisions are taken from the hands of apathetic voters and given to choosy customers.

INDIVISIBILITY OF THE DECENTRALIZED REFORM

It is important to emphasize that the characteristics of the decentralized model work only if all its components are present together:

- If there are no legislative or bureaucratic barriers to innovation in education (such as a mandatory, national curriculum) and individual schools have sufficient autonomy.
- If there is real competition between schools and no preferential treatment (i.e., various subsidies).
- If parents and children have a true right to choose the school they want.
- If it is the customers' choice, not the decision of a state school inspection, that determines which schools prosper.

If we omit any part of the decentralized reform, we thwart the correct operation of its algorithm that generates solutions in a changing environment. For example, if a civil servant, not individual schools on the local level, is responsible for educational content and prescribes mandatory performance standards, neither competition among schools nor feedback from parents will help the education system adequately adapt.

CHANGES IN EDUCATION IN SLOVAKIA

Having highlighted a few advantages of the decentralized approach over the centralized approach, let us identify and propose changes which can help the education system in Slovakia move from the centralized, rigid model toward the decentralized, adaptable model.



TODAY'S
EDUCATION SYSTEM
IN SLOVAKIA HAS
GREAT INERTIA
AND NOT EVERY
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AND IMPROVING
UPON THEIR
TEACHING METHODS

First, it is important to abandon the idea that educational content can be defined in laws or State Education Programs. This is because no one in the world knows exactly what the correct educational content looks like in the same way that no one knows what the right car,

cell phones, computer, or coffee machine looks like. These questions have to be answered through the process of decentralized discovery where customers' willingness to attend schools puts different methods to the test and identifies the best ones.

However, we cannot expect that it will be possible to abolish all regulation contained in the education laws, State Education Programs, framework teaching plans, and standards after several decades of this centralized approach. The change toward the decentralized model should be more evolutionary than revolutionary. Therefore, all barriers to decentralized reforms in the laws have to be abolished first of all.

This means that all the legislative regulations defining the present approach should not be removed from one day to the next, but should be made voluntary. Today's education system in Slovakia has great inertia and not every school and every teacher will be willing or able to innovate and improving upon their teaching methods. However, due to the fact that the decentralized reform will by definition not bring any new methods or content to these schools and teachers, they will continue to follow the traditional methods.

On the other hand, the decentralized model has to offer institutional support to those who are willing to innovate and improve their teaching methods. These teachers will not be told what to teach or how, but they will be allowed to teach what they consider best. There might be few schools and teachers willing to take this chance at first. However, the decentralized model does not offer immediate answers and results, but processes and discovery that need time.



IF THE STATE
WANTS TO CREATE
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OF MINIMAL
STANDARDS

If the state wants to create a framework for what schools should teach on the grounds that it spends public resources on them, it should not take place with an *ex ante* dictation of curricula, but by *ex post* testing of minimal standards. Therefore, there will be minimal standards for what children should be able to

do (hence not what information should the student know), defined for a given period of time (e.g., one or two years). These minimal standards will contain rough guidelines of what schools are expected to teach.

However, changes should take place on the side of customers, which will increase parents' and children's motivation to carefully choose their school and offer good feedback. The best way to achieve that would be to introduce education vouchers which are issued for every student to be given to their school of choice. As a result, parents and children will become more aware of the importance and weight of their choice.

CONCLUSIONS

Slovakia is not the only country which is still looking for the optimal type of education reform. Education systems suffer from various problems in all countries of the world. Problems in these countries vary in size, but in principle, they cannot optimally react to changes in the world around us. There are large differences in the performance of education systems in different countries, but these are often influenced by factors outside of the education system such as social values attributed to education and the love of reading (for example, an average person in Finland visits a library 10 times per year and borrows 18 books, magazines, etc.; education is a frequent topic of family discussions)⁶.

The difference between the centralized and decentralized approach to education reform should be generally applicable re-

⁶ Finns are avid readers and library users. Read more: <http://okm.fi/OPM/Verkkouutiset/2012/04/kirjastotilas-tot.html?lang=en>; To find out more on the importance of education in Finland see: <http://www.cps.org.uk/files/reports/original/150410115444-RealFinnishLessonsFULLDRAFTCOVER.pdf>

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WHAT THE SLOVAK EDUCATION SYSTEM NEEDS TODAY IS CUSTOMERS FILTERING OUT TEACHING METHODS, TEACHERS, AND SCHOOLS THAT ARE NOT INTERESTED IN PROVIDING HIGH-QUALITY EDUCATION, BUT ONLY IN TEACHING WHAT THEY ARE TOLD EVERY YEAR

ardless of cultural and historical background of individual countries. The decentralized approach should work across different cultures in the way that the market mechanism provides groceries efficiently in the United States, the Czech Republic, and Japan. A recent meta-analysis of 65 studies comparing different education systems across all continents tries to

isolate their effect and finds that freer and more decentralized systems produce better results⁷.

This result is no coincidence. The centralized approach has a tendency to be delayed, rigid, lacking in innovation, employ unmotivated people, and lack sufficient feedback. In contrast, the decentralized approach offers flexibility, innovation, motivated people, and direct feedback. However, moving from the centralized to the decentralized model will not improve quality and efficiency of education on its own. It will only create conditions favorable to such improvements.

What the Slovak education system needs today is customers filtering out teaching methods, teachers, and schools that are not interested in providing high-quality education, but only in teaching what they are told every year. Many people will have to leave the education system and many old structures will have to be broken. This process of reconstruction cannot be supplemented by top-down reform; it has to be done organically. However, if an institutional environment in the form of the decentralized approach to reforms is not created, this process will never start. ●

⁷ Coulson, A.J. (2009) "Comparing Public, Private, and Market Schools: The International Evidence", [in:] *Journal of School Choice*, 3, pp. 31–54.



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Education in Poland at the Service of the Ruling Party



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MIŁOSZ
HODUN

Law and Justice won an absolute majority in the Polish Parliament more than one year ago. Immediately after the new government was formed, things in Poland started to change at a great pace and in a very bad direction from the liberal point of view. Jarostaw Kaczyński, the leader of the ruling party, together with his puppets (President Andrzej Duda, Prime Minister Beata Szydło, the cabinet, and party speakers in both parliamentary chambers), embarked on a war against a number of achievements of the last 27 years of democratic Poland. One of the fronts is education, even though Poland is considered to be a European success story due to the results of school reform between the early 1990s and 2015.

What is more, the biggest beneficiaries of the reforms were disadvantaged children from smaller towns and villages, whose parents the socially oriented Law and Justice party wants to represent. However, the desperate need of the party to introduce their changes in every field of public life pushed the government to undo reforms and take Polish students back to the 20th century. At the same time, ideology was effectively smuggled into curricula. Schools will thus reflect a conservative, nationalist, and Catholic point of view, the only one that Jarostaw Kaczyński approves.

The current government does not care about quality of teaching or the competitiveness of Polish graduates on the European and global job markets. It wants to influence young people's worldview and shape the party's future electorate from the early stages of education. This dramatically illiberal agenda must be stopped and reversed. The role of the opposition is therefore to con-

vince society that changes in schools are based on manipulation and a political program, not on intentions to improve the status quo.

EDUCATION REFORMS IN POLAND

Following the modernizing reforms launched at the end of the 1990s, Poland was the biggest education success story among Central European countries. In the early 1990s, more than 60 percent of adults living in rural areas in Poland had only a primary school education. Today, 39 percent of 30-year-olds have higher education diplomas. No other European country climbed the international education rankings as consistently as Poland (e.g., OECD's Programme for International Student Assessment). Polish students improved their results in all competence fields tested: mathematics, science, and reading and interpreting. Moreover, the results are significantly better for both the best and the worst pupils. Results of Polish students were below the OECD average in 2003 and in subsequent surveys in 2006 and 2009, while in 2012, Poland achieved results significantly above the average level. The latest 2015 OECD education ranking places Poland as 5th in Europe and 11th in the world¹.

The education reforms started in the early 1990s with removing the ideological content of the Soviet-influenced curriculum. The score improvements are a consequence of the Polish education system reform introduced in 1999. The most important change was an extension of comprehensive education by one year. Poland's elementary school tier was reduced from seven to six years, but with a new three-year "gymnasium" (middle school) tier

¹ http://www.oecd.org/poland/Law_and_Justicea-2015-poland.htm

tacked on. That gave all pupils an extra year before deciding on their paths to higher education or vocational training. The evidence suggests the change immediately benefited students.

The remaining elements of the 1999 reform are responsible for gradual improvement. These included:

- structural change accompanied by the reform of the curriculum and qualifications. A new core curriculum was still being fine-tuned until 2015, as were new university entrance exams. What is important is the fact that there was a political consensus on how to reform Polish education system to make it more competitive in Europe and the world;
- introducing external national exams. The first exams were launched in 2002 and now monitor students' performance at the end of every stage of education. The exams are standardized and individual results are available to all students and teachers. The results at school level are also made available to the public;
- extending school and teacher autonomy to allow teachers to decide which textbooks and teaching methods to use²;
- establishing a system of teacher development with four professional levels. The system created incentives to improve teaching, although it was criticized as being too bureaucratic;
- further decentralization of the governance and financing system. Currently, local governments are partly responsible



THE EVIDENCE FROM PISA SHOWS THAT POLISH STUDENTS HAVE OUTPERFORMED STUDENTS IN THE CZECH REPUBLIC, SLOVAKIA, AND HUNGARY

for financing education, although most of the funds are transferred from the central budget.

Maciej Jakubowski, an education expert from the University of Warsaw, wrote in his 2015 report: "Over the last 15 years we have observed a sequence of school system reforms in Poland with one main goal: to create new opportunities for students to learn and achieve more. Gradually, Poland extended comprehensive education for all students and also improved the curriculum by emphasizing core skills and problem solving. Furthermore, Poland increased its investment in preschool education and foreign language teaching. Although the reforms were much broader than that, the key to understanding the consistency of the Polish reforms over time is to see that the main aim of extending comprehensive education has remained the same over the years. This goal is very different from what has been happening in the neighboring countries, where few students are

² The introduction of a single government textbook for first graders in 2014 (by Donald Tusk's Civic Platform government) should be seen as a step back toward the limitations of the old system.

given the opportunity to continue their general education and enroll in higher education”³.

The evidence from PISA shows that Polish students have outperformed students in the Czech Republic, Slovakia, and Hungary. That can be related to the distinct path of Polish reforms, as, for example, those three neighboring countries still have a very early selection of students⁴.

The core curriculum was revised substantially in the 2008 reform. Currently, the curriculum outlines learning outcomes that should be achieved at the end of each stage of education. It does not specify the teaching content and allows for variations in the distribution of materials over time. The new syllabus limits the need for knowledge acquisition and focuses more on problem solving, analytical skills, and soft skills such as teamwork. It blurs the boundaries between subjects and emphasizes fundamental skills, also in vocational education⁵.

The new school evaluation scheme has been gradually introduced since 2009 and replaced the old overly bureaucratic system of inspections. It is based on visits by assessors but is supported by self-evaluation tools. It is also data-driven as the assessors, teachers, and school principals can benefit from numerous research tools that provide quantitative and qualitative information about students, teachers, and parents.

Poland has also increased its support for pre-school education and expanded the general curriculum in vocational schools.

According to the OECD Directorate for Education working papers (produced in an attempt to explain Poland’s success), on average, the educational reforms in 1999 were “associated with significant improvements”⁶. As it is emphasized, “Reformers had two main arguments for the changes. First, dividing education into stages would allow teaching methods and curricula to better meet the specific needs of pupils of various ages. Second, a structural reform would have to be linked with a curricular reform, otherwise those teachers who resisted the reform may continue to teach their pupils in the same ways as they had for many years. So teachers were encouraged to change what they taught and how they taught it”⁷.

INTRODUCING THE COUNTER-REVOLUTIONARY EDUCATION REFORM

After coming to power in 2015, the Law and Justice party began its counter-revolution in education by closing gymnasiums. As of September 1, 2017, students will attend eight years of primary school and four years of high school. This will replace a system of a six-year primary school, a three-year middle school, and a three-year high school. The structural change influences the teaching programs of all school levels and allows them to put new content into all syllabi for all grades.

The use of the phrase “counter-revolution” is appropriate because it is hardly a reform. Lacking ideas for a proper education reform, the Law and Justice government decided to bring about a radical

³ http://ibs.org.pl/app/uploads/2015/02/IBS_Policy_Paper_01_2015.pdf

⁴ Ibid.

⁵ See: Marciniak Z. (2014) *Reviewing Polish education reform in the late 1990s – possible lessons to be learned*, World Bank Report.

⁶ <http://www.oecd-ilibrary.org/docserver/download/5kmbjgkm1m9x-en.pdf?expires=1483104415&id=id&ccname=guest&checksum=B5BD7A5F4779BCF578999CCC51253CD4>

⁷ <http://www.oecd-ilibrary.org/docserver/download/5kmbjgkm1m9x-en.pdf?expires=1483104415&id=id&ccname=guest> and *ibid*.

change by listening to opinion polls⁸ – and although in theory this seems like a good practice, in practice it is not. According to polls, gymnasiums happened to be perceived by public opinion as places full of aggression and not adjusted to the needs of pupils. However, this perception is a consequence of the tabloidization of the issue by the Polish press rather than a reflection of real problems.

The findings of the Institute for Educational Research in 2015, based on national and international surveys, present a different image⁹. The scale of harassment in Polish schools (in comparison to almost 40 countries or regions) is described as average. Furthermore, it is not true that the situation is worsening. Data from 1997, 2003, and 2007 indicate that the situation is stable or that the scale of aggression and violence in schools is slightly receding¹⁰. Moreover, the overall state of affairs in gymnasiums is not all that bad. A 2011 survey called “School without Violence” concluded that 49 percent of pupils were physically assaulted in grade schools, 36 percent in gymnasiums, and 18 percent in high schools. Since Law and Justice does not have a specific program to eliminate violence from Polish schools, its only proposal is to eliminate gymnasiums and sweep the issue under the carpet.

Nevertheless, the current Minister of Education, Anna Zalewska (famed for contesting the Poles’ responsibility for anti-Semitic actions during

⁸ E.g., <http://www.newsweek.pl/polska/gimnazja-do-likwidacji-ilu-polakow-chce-likwidacji-gimnazjow-sondaz,artykuly,375811,1.html>;

⁹ Estimates indicate that 10 percent of Polish pupils are affected by harassment. According to an HSBC survey from 2009-2010, 14 percent of 11-year-olds, 11 percent of 13-year-olds, and 7 percent of 15-year-olds are victims of harassment (harassed at least two to three times per month in the last couple of months prior to the survey).

¹⁰ <http://www.ibe.edu.pl/pl/kontakt/381-przemoc-w-polskiej-szkole-jak-naprawde-wyglada>



CONTRARY TO POLITICIANS FROM THE RULING PARTY, EXPERTS CLEARLY STATE THAT THE INTRODUCTION OF GYMNASIUMS PROMOTED THE ADVANCEMENT OF YOUNG POLES

and after WWII), is not interested in those figures. What is even more horrifying, she is also not interested in the data derived from PISA tests. Minister Zalewska is concerned solely with obtaining Jarostaw Kaczyński’s approval. And his endorsement can be easily won by destroying everything that was achieved in Poland over the last 27 years.

Contrary to politicians from the ruling party, experts clearly state that the introduction of gymnasiums promoted the advancement of young Poles. Local governments, the Polish Teachers’ Union, parents, university chancellors, and even experts cited by the Ministry of Education (!) are widely critical of the phasing out of gymnasiums.

Clearly, the PISA tests are not of great value to Law and Justice politicians because they do not take into consideration knowledge about history, Polish literature, or religion¹¹.

¹¹ Minister Anna Zalewska claims that PISA results do



However, it is surprising that a party which claims to be a promoter of equal opportunity and social causes pays no attention to tests that prove gymnasiums helped children from underprivileged families, neglected rural environments, and those with a lower socio-economic status.

The analysis conducted by Michał Sitek of the Educational Research Institute found that, between 2000-2012, the diversification of results decreased, mainly thanks to the worst students achieving better results. The differences between students with the lowest and highest socio-economic status shrunk, as did the influence of social origins on the choice of upper secondary schools¹².

Moreover, Drucker and Horn's 2016 report showed that creating equal opportunities through the introduction of gymnasiums produced long-term effects¹³. Middle-school graduates in Poland had higher chances of finding a job and earning higher salaries. The effects were most visible among students who achieved the lowest education results¹⁴. According to a Eurostat report¹⁵, compared to other European countries, Polish middle school teachers are well-educated, eager to teach, and younger than the average: 51 percent are younger than 40.

not prove educational success of Polish students and states that, although they constitute good revision, they cannot solve any problems. <http://wyborcza.pl/1,75398,20728955,zalewska-o-badaniu-pisa-pokazuje-ze-polscy-uczniowie-swietnie.html>

¹² <http://www.edukacja.ibe.edu.pl/images/numery/2016/2-7-sitek-zmiany-w-nerownosciach-edukacyjnych.pdf>

¹³ <http://www.econ.core.hu/file/download/bwp/bwp1602.pdf>

¹⁴ http://www.iesw.lublin.pl/rocznik/articles/RIESW_1732-1395_14-4-260.pdf

¹⁵ http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/151EN.pdf

DRAWBACKS OF THE NEW EDUCATION REFORM

There are several aspects contributing to the problematic nature of the reform by the Law and Justice government. Among these:

- *Fast implementation.* Law and Justice wanted to adopt this serious and complicated project in three sessions of the Sejm (lower house of Parliament). The speed of implementation is the cause of deep distress, even inside the government. The Ministry did not offer any viable and documented arguments supporting change in the educational system. Ninety-nine representatives of Polish academia from different universities issued a letter to the Minister of Education in which they criticized the rush, the lack of factual consultations, and expressed their worries about "squandering the most important educational concepts formulated after 1989"¹⁶. The authors pinpoint three main issues: 1) the closing of gymnasiums was never justified to the public; 2) there were no long-term consultations on the new core curriculum with experts; 3) the Minister's idea to write the core curriculum piece by piece is highly controversial – for example, rewriting the existing curricula only for grades 4 and 7, and not for all the affected grades¹⁷;

- *The new educational model starts functioning in 2017.* This means that the current sixth-graders will go to the seventh grade instead of gymnasium. This requires a new core curriculum for grades 1, 4, and 7, including new textbooks, all of which will have to be written at an unimaginable speed;

¹⁶ <http://wyborcza.pl/1,75398,20790099,polonisci-przeciw-zmianom-w-edukacji-apeluja-do-anny-zalewskiej.html>. Own translation.

¹⁷ <http://wyborcza.pl/1,75398,20790099,polonisci-przeciw-zmianom-w-edukacji-apeluja-do-anny-zalewskiej.html>

- *High costs.* Minister Zalewska informed the public that the sum of PLN 900 million (EUR 209 million) are the funds “directly dedicated to the reform”. Enormous amounts of money have already been spent on gymnasiums. According to the Association of Polish Cities, the construction and management of middle schools has cost around PLN 130 billion (EUR 30.2 billion) of public money, 8 billion of which were capital expenses¹⁸. Today no one knows what would happen to all the infrastructure. The government remains silent in this regard. Local and regional authorities will probably have to find suitable solutions and pay for them on their own;

- *Chaos and uncertainty.* Instead of going to the first year of gymnasium, children who are currently in the sixth grade are supposed to go to seventh grade next year. It remains uncertain where they are supposed to continue their education. If they stay in the same school, many smaller schools will have to switch to a two-shift system. Some local governments are considering separating their elementary schools into two buildings. If the educational revolution enters into force this year then teaching of the seventh graders will be an act of complete and utter improvisation. There are no core curricula, no textbooks, no teaching programs. There will be no more than a couple of months to prepare – including a reorganization of the schools in the communes and, among others, retrofitting of buildings. There are still no guidelines, regulations, or detailed data regarding this reform. Law and Justice ignores these concerns;

- *Teacher redundancy.* Despite Minister Zalewska’s declaration that only a small percentage of teachers will be let go, lo-

cal governments are announcing that the numbers could reach a couple thousand. The Polish Teachers’ Union asserts that the closing of middle schools will cause an avalanche of redundancies – 45,000 teachers and 7,500 school principals could be sacked¹⁹.

To put it bluntly, Law and Justice had prepared a roller-coaster ride for Polish pupils. There is no detailed plan, no positive expertise, no time to adjust or convince the subjects of the reform of its validity. Once again, the government believes that turning everything upside down *is* reform. But it is not. It is only an extremely pricey, extravagant, and dangerous PR measure that will have negative consequences for society.

NEW CURRICULUM

A new school structure means new chances to change the curriculum and fill it up with content that would please Jarosław Kaczyński and his acolytes, such as conservative communities and the Catholic hierarchy.

The Polish Academy of Sciences criticized the new curriculum prepared by the Ministry of National Education. The Environmental and Evolutionary Biology Committee of the Academy of Sciences expressed distress over the fact that pupils no longer have to know much about evolution. The Polish Language Council, on the other hand, considers the project proposal incoherent, full of mistakes, and written by an incompetent team of authors. Council members are worried that, because of the new program, “ac-

¹⁸ <http://www.money.pl/gospodarka/wiadomosci/arttykul/likwidacja-gimnazjow-ile-bedzie-kosztowac,98,0,2186082.html>

¹⁹ Today there’s 11 pupils per teacher in Polish primary schools, compared to 14 on average in the EU, and 11 pupils per teacher in upper secondary schools, compared to 12 on average in the EU. In both categories, Luxembourg comes first with 9 and 7 pupils, respectively, and the UK comes last with 22 and 19 pupils, respectively. http://ec.europa.eu/eurostat/statistics-explained/images/fff/Teachers_and_pupils_in_the_EU.jpg

quiring knowledge will become passive and memory based²⁰, whereas critical assessment will be out of reach for many students.

The history program, which dictates that children be taught world history only as of fifth grade, is also controversial. Learning about events and people “who helped shape Polish cultural identity in a significant way” will start in the fourth grade. Interestingly enough, but not surprising, is that Lech Wałęsa, a personal “enemy” of Jarosław Kaczyński, was scratched from the lessons about the Solidarity movement.

Moreover, a new subject will be introduced: Patriotic Education. Its objective will be to “shape patriotic and civic behavior, a sense of identity and national, cultural and individual awareness”. It will be used by the government as a chance to introduce to schools more nationalism and conservatism, since this is how Law and Justice understands patriotism. In this case, it will be introduced directly. The Minister will not have to hide this kind of content in the syllabi of Polish literature or history lessons. Those who believe in modern and positive patriotism, a more European one, are as a rule regarded as nothing more than traitors in the eyes of the government and will not find their place in school curricula.

The new program is also accused of being piecemeal. The subject “Nature” will be removed from elementary school curricula completely, regardless of the fact that the latest research on the processes of learning and child development gives no mention



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²⁰ http://www.rjp.pan.pl/index.php?option=com_content&view=article&id=1723:uwagi-do-projektu-podstawy-programowej-men-jezyk-polski-szkola-podstawowa-klasy-iv-viii&catid=45&Itemid=55. Own translation.

of the benefits of splitting nature lessons²¹. Fewer scientific experiments will be performed. On top of that, the mathematics program will be pared down.

Furthermore, the Minister fails to understand that the foundation of a modern and competitive economy starts in elementary school and its success rests on a good level of education about nature, mathematics, and computer science²². Expanding the compulsory reading list of Polish literature from the Romantic period²³ and a more extensive knowledge of history and religion play no part in building an economy based on innovation which can compete with the most developed countries of Europe and the world. Expansion for the sake of expansion is pointless. Children do not need more education based on memorizing and recalling. The humanities should teach how to discuss, draw conclusions, and solve problems²⁴. Law and Justice pursues the goal of shaping young Poles to develop the party's mindset: to make them conservative patriots. The Minister, who looks up to Jarostaw Kaczyński, does not care about education as a tool enabling the development of students (and, by extension, Poland as such) but as a chance to educate

a new generation of voters. Self-obsessed Poles who do not understand the basics of teamwork, who do not care about the world, are Euroskeptics. They are the last hope for the survival of Law and Justice.

We may already see signals of such an intention – recently, the Ministry of National Education organized a conference on “Freedom and Dignified Behavior”. The problem is that its participants represented one world view, the one accepted by Law and Justice²⁵.

The Ministry created a system of tight control over the progress of its own program. They fired all the superintendents of schools, installed new ones, and assigned them special functions. Superintendents, who answer directly to the Minister, will now have to assess the usefulness of teacher formation to the achievement of government education policy²⁶. In other words, they will have the tools to block teachers who want to do something modern, creative, or not in line with the educational stance of the party. Thus, there will be less experimentation, flexibility, and creativity.

EDUCATING 6-YEAR-OLDS

Apart from the debate on gymnasiums, there is one more crucial counter-reform that the Law and Justice government car-

²¹ *Edukacja Biologiczna i Środowiskowa*, 2015/4, pp. 48–61.

²² Nature – only in the fourth grade. Geography and biology – starting in the fifth grade, chemistry and physics – starting in the seventh grade. Knowledge about society and education for safety – in the eighth grade.. Source: <http://www.tvn24.pl/wiadomosci-z-kraju,3/men-przedstawia-podstawy-programowe-trafia-do-pre-konsultacji,696093.html>

²³ There used to be no pre-determined reading list for grades 1–3. Now there are 10 books planned for early school years.

²⁴ Another cause for distress and protests is the Ministry's announcement that the core curriculum for history and knowledge about society will be prepared by historians chosen by the Institute of National Remembrance. The current President of the Institute, Jarostaw Szarek, questions the role played by Poles in the Jedwabne killings and assigns “full responsibility” to the German occupiers.

²⁵ The conference was under the patronage of Professor Krystyna Chataś (from the John Paul II Catholic University of Lublin), the author of such publications as *Education Towards Religious Values*, *Education Towards Values in Light of the Teachings of John Paul II*, and *Education Towards National and Patriotic Values*. These books will be the foundation of the moral revolution in schools.

²⁶ Additionally, the core curriculum is very rigorous. Concrete goals must be pursued by each grade. Framework teaching plans have been modified as well and define how many lessons of a given subject each grade should have. Until now, the lesson plans were laid down by the principals. The core curriculum indicated what needs to be covered in grades 4–6 and teachers could autonomously decide when it would be taught.



EARLIER SCHOOLING IS THE BEST HOPE FOR CREATING EQUAL OPPORTUNITY

ried out in its first year in office. Namely, the abolition of the reduction of the compulsory schooling age from seven to six.

The gradual reduction of the compulsory schooling age from seven to six years old began in Poland in 2009. During the first five years, parents were given a choice to decide whether their children should go to school at age six or seven. On September 1, 2016, for the first time, it became compulsory for 6-year-olds (i.e., children born after 2009) to start first grade. A year earlier, it was mandatory for half of all 6-year-olds to go to first grade alongside 7-year-olds.

Reducing the compulsory schooling age was especially important in rural and underprivileged areas, with low social capital. Earlier schooling is the best hope for creating equal opportunity. The ombudsman for children claims that “Social structure and growing material gaps affect the chances of children and teenagers at an equal education. The situation in rural areas deserves particular attention because a range of factors which negatively impact the educational chances of the youngest children comes into play”²⁷. The reform also promoted preschool education in rural areas.

²⁷ Marek Michalak in a letter to Anna Zalewska. Excerpt translated by Natalia Czekalska. http://brpd.gov.pl/sites/default/files/wyst_2016_09_27_men.pdf

New preschools were created outside the city²⁸. Preschool activities stimulate children’s development and prepare them for school, teach them peer relations, and in the case of children with low cultural capital, stimulate their intellectual development.

The 2009 reform reduced the compulsory schooling age and was deemed controversial by a large group of parents who resisted it. The Ombudsman for Parents Association and Foundation collected almost 1 million signatures for a petition demanding a referendum regarding the withdrawal of the reform. However, the reform opponents failed to present factual arguments. Their “reports” were a collection of emotional letters from parents of children who suffered from going to school earlier or, as the organizers put it, because of “their stolen childhood”. This was reminiscent of 1919 when Poland introduced compulsory schooling. It was contested by over half of the parents but the resistance was overcome in the name of children’s well-being.

The previous Civic Platform government made a fatal mistake by ignoring the protesters. Law and Justice, then in opposition, did not and promised a withdrawal of the reform. Yet again, common sense lost to the electoral calculations of Jarosław Kaczyński²⁹.

²⁸ There remains a significant disproportion between access to preschools in cities and rural areas in Poland. According to data published by the Central Statistical Office, in the 2014-2015 school year, 79.4 percent of children between 3-5 years old went to preschool centers. That compared to 92.9 percent of children living in cities and only 60.8 percent of children living in rural areas.

²⁹ However, in this particular case, the calculations were in line with Law and Justice’s conservative worldview, according to which children should stay home with their mothers for as long as possible and be raised according to tradition. Pre-school is thus viewed by Law and Justice as an interference with family life and as a way of pushing women (oh, the horror!) to work.





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For campaign reasons, he allied with the opponents of lowering the age at which children start school education. Ensuring equal opportunity for development of children from smaller towns and villages did not play any role when some extra votes were at stake.

Once more, the only reform Law and Justice had to offer was to annul previous reforms. And so, in 2016, the government abolished compulsory education for 6-year-olds and returned to making it obligatory for 7-year-olds.

When that happened, for the first time ever, the Polish Academy of Sciences took a stance in the discussion. In a letter to Prime Minister Beata Szydło, the Social Education Task Force assigned under the Pedagogical Committee of the Academy of Sciences called the backing away from compulsory schooling a "drastic offence towards Polish children".

ALTERNATIVE RECOMMENDATIONS FOR REFORMING EDUCATION IN POLAND

Polish schools do not need a revolution. What they need is a systematic change built on previous successes that would level out mistakes. Polish students should not be treated by Minister Zalewska as lab rats. Today they are a part of the worst kind of experiment, one that is happening fast, in an uncontrolled environment, and the results of which are to be ideologically charged. That is not what the education system should look like – it needs to be stable and predictable so that children, parents, teachers, and local governments can make the best of it.

There is a lot to be done in this respect. The PISA test results are important, but they cannot be the only reference point for measuring the quality of Polish education. School should prepare students for life, not only for solving tests. Polish schools need to focus on teaching group interaction, risk-taking, and thinking differently. But to accomplish those aims, the government would have to set different priorities, change the curriculum to focus on new learning methods and soft skills, give more flexibility to teachers, and invest in permanent training of the older ones. We should expand and modernize the nature and computer science curricula. The teaching of those subjects needs to be more individually tailored to meet the needs of the pupils. Economics and democracy should be part of the curriculum³⁰.

Polish employers rarely complain about graduates' lack of core or subject-specific skills, but they often report a lack of communication or interpersonal skills, problems

³⁰ "Entrepreneurship" and "knowledge about society" are already part of the curriculum but there are very few lessons in these subjects and they are often treated as non-essential.



FOR 60 PERCENT OF YOUNG POLES, INTERNET IS THE MAIN SOURCE OF KNOWLEDGE WHEN PREPARING FOR SCHOOL. NEVERTHELESS, ONLY 21 PERCENT DOUBLE-CHECK INFORMATION FOUND ONLINE

with self-organization, or a lack of specific vocational skills. Although some attempts have been made to include soft skills training in the 2008 curriculum, Polish schools struggle with their implementation.

Children must also be able to develop digital skills in school. Coding and programming basics should be taught as early as elementary school. The digital competencies of Poles remain low.

Moreover, youth trusts information found online (66 percent finds online information very trustworthy or trustworthy) and for 60 percent of young Poles, internet is the main source of knowledge when preparing for school. Nevertheless, only 21 percent double-check information found online.

That is why media literacy³¹ should become one of the priorities in digital education in Poland. It would develop critical thinking skills to evaluate media messages.

Furthermore, Polish children need support in learning foreign languages. The first foreign language should be introduced in the first grade of elementary school. At the same time, Polish schools lack a practical approach to teaching languages – passing the A-levels language test with merit does not guarantee that the graduate will be able to communicate abroad. Therefore, it is necessary to find additional financing for online educational tools, practical languages lessons, and, if possible, for international exchanges.

Modern schools should be aware of the realities of the labor market and react to its needs. Vocational schooling shall be reintroduced and linked to the local labor market so it will not stand in the way of higher education.

Today vocational school graduates have the door to universities closed. They feel like second-class students with second-class degrees. The two learning paths must be intertwined so that vocational students could develop their education in a coherent and continuous way. Graduates from vocational high schools can be successful in navigating through highly competitive job markets as they possess relevant sets of skills that are in high demand in the modern economy.

Schools should be able to educate in the dual system, i.e., in cooperation with companies³². That way, it would be easier to

³¹ Media literacy is the ability to access, analyze, evaluate, and create media.

³² This system is practiced in several countries – notably, Germany, Austria, Switzerland, and South Korea. As part of the dual education course, students are trained in a company for three to five days a week. The com-



THE REFORM'S MAIN GOAL IS TO SHAPE POLES WHO WILL EMBODY THE LAW AND JUSTICE POLITICAL PROGRAM

react to fast-changing market needs and adjust professional training to the requirements of the local labor market.

Finally, the success of schools rests chiefly in the hands of teachers. Well rewarded and free in their choice of teaching style and subject matter, they will be more flexible toward pupil needs and capabilities. The so-called Teacher's Charter should be modified³³. As it is currently written, instead of promoting the best teachers, the charter protects the weakest teachers. Now, the charter fixes weekly quotas of teaching hours (meaning no flexibility in the long term), makes it very hard to fire teachers, and centralizes salaries (calculated in Warsaw for all teachers), making them unrelated to teacher's efficiency or engagement. The document is seen by some econo-

pany is responsible for ensuring that students get the standard quantity and quality of training set down in the training descriptions for each trade. Students are therefore employees of the company from the beginning and receive tasks according to their developing abilities.

³³ Teacher's Charter is a law regulating the rights and obligations of teachers in Poland. It supersedes the Labor Code.

mists and many local authorities as a privilege, a relic that serves teachers and not students or society³⁴.

School principals have to be free in managing the school as well as rewarding teachers and other staff. Principals have to be able to fire teachers who do not live up to the requirements. Furthermore, principals have to be able to vary wages according to subject, whereas promotions have to be transparent and reward the best teachers.

CONCLUSIONS

Unfortunately, Law and Justice's activities in the field of education remind many of the dark times of Poland's previous regime. So-called reforms are rattled through. The most important changes are either semantic (new names for schools) or ideological. The reform's main goal is to shape Poles who will embody the Law and Justice political program. "Young patriots" are meant to be the new voter base of Jarostaw Kaczyński's party – a new generation of Polish patriots who will know all the details of the everlasting conflicts between Poland and its neighbors, but will not be able to contribute to the acceleration of scientific advancement. Law and Justice weaponized schools in its war against liberal democracy, the development of civil society, and European integration.

In his critique of the slogan "More patriotism in school", former Director of the Central Examination Commission Professor Krzysztof Konarzewski stated that he remembers school during the People's Republic of Poland, which promoted patriotism and ideological internationalism at the same time. "Two points of view: the national and the Soviet-communistic were reconciled through the view that the proletariat of all countries must unite. There

³⁴ E.g., Leszek Balcerowicz. <http://www.rp.pl/artykul/890024-Karta-szkodzi-uczniom.html#ap-1>

was talk of a great Poland and great Poles, and at the same time, of the Soviet Union, which stands at the head of the proletariat of the world. The propaganda of the Polish People's Republic preached that we were the 10th world economy, that we were free of sin. Ideological zeal coupled with lies enslaves the mind. And enslaving the minds of young people is a sin, a crime against the nation. If Kaczyński wishes to repeat that strategy, let me remind that for years, the Polish People's Republic was approaching its own fall and eventually fell³⁵.

This sort of treatment toward young Poles should cause outrage. And, thankfully, it does. Education is the foundation of a modern country and a measure of its success as well as the guarantor of a better future for its citizens. Several of Law and Justice's bad reforms dealing with other areas can be undone in the future. But education reforms? Not so easily. Changes with such serious effects cannot just be revoked. Public opinion is beginning to understand this. Emotions and feelings are being replaced with knowledge and data.

Support for Law and Justice's proposals is decreasing³⁶. In November 2016, 42 percent were against the reform, whereas 39 percent were in favor³⁷. The Teachers' Union with opposition parties are trying

³⁵ <http://www.newsweek.pl/polska/reforma-edukacji-szkola-w-sluzbie-patriotyzmu-wedlug-Law-and-Justice,filmm,396168.html>

³⁶ The closing of gymnasiums is mainly backed by the "people's electorate". Although the children who benefited most from the introduction of gymnasiums are the ones from less-cultured families. 57 percent of the people who back the closing completed primary education (compared to 39 percent who completed higher education) and 58 percent of people live in the countryside (compared to 34 percent who live in the biggest cities). Source: <https://oko.press/likwidacje-gimnazjow-popiera-glownie-ci-ktorzy-nich-chodzili/>

³⁷ <https://www.wprost.pl/kraj/10032501/Sondaz-Polacy-sa-zwolennikami-czy-przeciwnikami-reformy-edukacji.html>

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to collect at least 500,000 signatures for an anti-reform referendum. More protests are taking place or are in the pipelines. The biggest one so far took place in Warsaw in November 2016 and gathered 50,000 people.

People who live in cities are assembling. The big-city, better-educated, and dynamic electorate is backing a model in which teenagers enter gymnasiums as they perceive the transition to another level of education not as a risk, but as a chance³⁸.

Law and Justice brought chaos to Polish schools. While parents try to find good schools for their children, principals are busy with preparing new working schedules, the new regionalization policy, and moving libraries from school to school, the government is free to change the program in peace.

On the one hand, the relation of parents and pupils to schools is based on coercion – from a certain age for a determined number of years, schooling is compulsory. But on the other hand, this coercion is justified by the second pillar of that relation – trust that schools teach what is necessary to achieve success in private and professional life. Law and Justice-backed schools do not gain trust by replacing knowledge with faith and manipulation. As Chancellor Jan Zamoyski once said, “Such will be the Commonwealths as the upbringing of its youth”³⁹. Let us remember that as a warning and as advice.

That is why today all of Poland’s liberals should oppose the pseudo-reforms of education. For Law and Justice, schools

(much like the media and cultural institutions) are above all a political battleground used to maintain power and ideologically dominate the conservative right. We cannot allow Poland to rejoin the group of countries in which the role of the school is to maintain the cult of the country and teach about the leading role of the party and its religion. If we stop protesting, it could turn out that in a couple of years, A-level dissertations will discredit the judges of the Constitutional Tribunal or be devoted to the Smolensk “assassination”. Let us not let that happen. ●



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MIŁOSZ
HODUN

³⁸ <https://oko.press/likwidacje-gimnazjow-popierajaglownie-ci-ktorzy-nich-chodzili/>

³⁹ Foundation Act of the Academy of Zamość (1600). Own translation.

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Reforming the History Curriculum in Poland: The Good Change Strikes Back



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DARIA
HEJWOSZ-GROMKOWSKA

"He who controls the past controls the future.
He who controls the present controls the past."

—George Orwell, 1984

DO WE REALLY NEED HISTORY EDUCATION IN SCHOOLS?

What is the purpose of teaching history in schools nowadays? This question became a central point of a debate about history education in many Western countries and is widely discussed in Poland. It is not a surprise, then, that policymakers are trying to reform the curricula to adapt to transitions in societies. We need to remember that multiculturalism, globalization, and a weakening of a nation-state are huge challenges to school systems. For instance, ethnic and minority groups in most of the Western countries want to include their cultures and histories into the school and university curricula. In these circumstances, there is no doubt that many educational systems need to be constantly ready to reinterpret the aims of citizenship and history education in the context of global and multicultural challenges.

According to the adherents of conflict theory, schools reproduce the social order and transmit the ideology of the dominant group. The education system is susceptible to political changes. Every government has its own vision of political history that gets promoted through the school system. Progressive and liberal politicians usually try to find consensus among different groups of society. The school curricula, then, in-

cludes the history of minorities, issues that are deemed controversial, and it usually promotes global and national citizenship. Conservative policymakers tend to support national history, omit disputable problems, and disseminate the idea of patriotism.

There is still a belief that history education remains one of the tools used for nation-building. Will Kymlicka (2002) points out that people as members of a particular society are "more likely to make sacrifices for others if these others are viewed as 'one of us'". If we assume that history education is one of the tools in the nation-building process, the next question worth asking is: why would citizens need history education? Keith Barton and Linda S. Levstik (2008) identify three major reasons: to develop knowledge and skills, to develop commitment, and to develop loyalty. At the same time, they also notice that it is a controversial issue whether history education "can, or should contribute to citizenship."

Hence the question, why do we need history education? Or to be precise, what kind of history education do we need? The debatable issues usually concern the amount and the balance between national and world history, which historical figures should be discussed as national he-



THE GROWING BODY OF LITERATURE SUGGESTS THAT YOUNG PEOPLE ARE NOT INTERESTED IN STUDYING HISTORY BECAUSE THEY DO NOT SEE THE RELATIONSHIP BETWEEN PAST AND PRESENT, AND AS A CONSEQUENCE, THEY DO NOT REFER THIS RELATIONSHIP TO THEIR LIVES

roes, which victory should be promoted, and which events emphasized. The current debate on history education in many countries focuses on the key objectives of teaching as such, as well as the place of minorities in the curricula or the role of “academic history”, the methods and techniques of teaching, and the role of moral learning in the history course¹ in particular.

¹ Davies, I. (ed.), (2011) *Debates in History Teaching*, Routledge; K. C. Barton, L. S. Levstik (2008) “History”, [in:] *Education for Citizenship and Democracy*, (eds.) J. Arthur, I. Davies and C. Hahn, Sage, London; P. Gou-

IS CURRICULUM REFORM IN POLAND NECESSARY?

The growing body of literature suggests² that young people are not interested in studying history because they do not see the relationship between past and present, and as a consequence, they do not refer this relationship to their lives. Stephen J. Thornton states that the main goal of history education in American high schools is to prepare students for college rather than educate them³. The same situation happens in Poland, where schools put emphasis on exams, forgetting the main goal of education.

According to the critics of standardized tests, the process of learning has been reduced to the measurement of how well schools meet the state standards. The holistic development of a young person was replaced by an achievement-oriented approach expressed by test scoring. From this perspective, the school system exhibits a simplistic approach toward teaching and learning. It is necessary to equip students with the ability of critical thinking, to enable them to cope with the complexity of the world and to protect them against becoming merely the subjects of global corporations or other institutions, including the state.

The second area of criticism (in most Western countries) covers the issue of exclusion of minority groups from the official history. According to Gloria Landson-Billings (2005), official curricula “treat all students as if they were white,

nari (2008) “Unlearning the Official History: Agency and Pedagogies of Possibility”, [in:] *Ideologies in Education. Unmasking the Trap of Teaching Neutrality*, (eds.) L. I. Bartolome, Peter Lang: New York.

² Noddings, N. (ed.), (2005) *Educating Citizens for Global Awareness*, Teachers College Press, New York.

³ Thornton, S.J. (2005) “Incorporating Internationalism Into Social Studies Curriculum”, [in:] *Educating Citizens for Global Awareness*, (ed.) Noddings N. Noddings, Teachers College Press, New York.

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middle-class, natural-born citizens". This approach may result in a situation where the individuals who lack those features may feel marginalized and will probably never be able to develop civic virtue and identity.

From the postmodern perspective there is a perpetual and discursive struggle for the recognition of the correct version of the "truth". The conservative approach criticizes the inclusion of histories of various groups in the official curricula. On the basis of American (e.g., Gounari 2008, Hahn 2008) and British (Osler 2009) experiences we may observe that policy-makers (especially the right wing) perceive the history of a nation-state as the main source of national identity and as the very core of history lessons. Moreover, those who criticize the homogenous narrative of history and question controversial victories are accused of and labeled as being unpatriotic.

Analyzing the political debate on changes in the history curriculum in Poland, we can also observe that politicians from the right wing do not accept any "other" version of the "truth" and they are strongly convinced that "their" vision of the past is the only one to be accepted. On the other hand, politicians from the center and left have a passion for relativism and so they are sometimes losing ground and baseline pursuing the chaotic historical policy.

The last area of the criticism of history in schools refers to the teaching methods which are incapable of developing critical thinking in pupils. Young people are accused of being ignorant in the sphere of historical knowledge and it is claimed that our societies suffer from historical amnesia. The chronological narrative method cannot develop critical thinking and does not provide knowledge about

connections between the past and the present (Barton and Levisky 2008). Giving the students only facts and dates is one thing, but learning about a wider context of the problem is another. If only the former is in place, education may prove superficial.

In order to develop critical thinking among students, methods such as analyzing multiple sources, problem-solving, conflict-solving, negotiation, discussion, drama, roleplay, or field trips are recommended by experts.

HISTORY CURRICULUM REFORM BY CIVIC PLATFORM

In 2009, the Polish government introduced changes in the national curriculum for lower secondary schools (three years of gymnasium). In 2012, this was followed by upper secondary schools. It seems that policymakers have taken the contemporary criticism toward teaching history into consideration. They have paid attention to the teaching methods in order to teach students how to acquire historical thinking skills.

In 2012, there was also an attempt made to link the past with the present and to introduce critical thinking in schools – which resulted in the introduction of the approach labeled as “creating historical narratives”. More attention was paid to 20th century history, which had been treated very superficially in the former national curriculum. This part of history was therefore moved to the first year of education in the upper secondary school to ensure a more thorough analysis. So far, modern history was obligatory in the last years of education in the lower secondary school (gymnasium) and upper secondary school (lyceum). In practice, although students should learn about this period on both levels, usually, due to the fact that it was placed at the end of all



HISTORY ITSELF IS OFTEN A POLITICAL MATTER

history textbooks for the given educational stage, the students did not reach the units dealing with the most recent history as the end of the school year approached. Young people had acquired knowledge about ancient Egypt and the Middle Ages, but they have very limited knowledge of the part of history which most affects their lives. For instance, when I discussed this problem with my university students who were at school before reform, the majority of them admitted that they were interested in the history of communism and the breakdown of the regime in Poland after 1989, but they have never been taught about it in school, thus confirming the absurd organization of history in the curriculum.

However, this division was under attack in 2012 by some history teachers and opponents of the changes. They were afraid that a new curriculum would decrease the number of history hours, what did not happen. The students who choose science as their major in the upper secondary school still participate in a “History and Society” course. It is divided into nine modules which teachers can choose from, for example: “Europe and the World”, “War and Military”, “Women, Men and Family”, “Domestic and Foreign”, “Motherland Pantheon and Internal Disputes”. The teachers decide what to teach and how to teach it – they can discuss the problems throughout the ages or discuss all issues in the selected period of time. Moreover, this change gives teach-

ers freedom and possibility to cover the concerns which they are most interested in. The critics of these proposals, especially from the right wing, point out that little attention is paid to the history of Poland. According to the Ministry of National Education's officials and policymakers, the aim of the course was to show that humanities could easily facilitate the understanding of the present and recognize current problems⁴.

Before the new curriculum was introduced, a heated political debate erupted. The proposals of the Ministry were condemned and rejected by right-wing politicians and met with the approval of those in the center. Those discussions revealed that not only the history curriculum, but history itself, is often a political matter. It also showed how differently history education can be perceived by politicians from the right wing and from the center or left. From this perspective, history seems to be an ideological trick juggled by politicians. From this perspective, the curriculum content is usually politicized.

Politicians, experts, teachers, and scholars from the right wing were against the changes, especially in the upper secondary school. They did not approve of the fact that history was being divided into non-obligatory modules and that the history of Poland was merely one of the options. Moreover, they protested against linking history with social studies, maintaining that the historical knowledge would be scattered and incomplete. It is worth noting that most of those politicians are now in power.

⁴ Ministry of National Education (2012) Press notice from June 12. Available [online]: https://www.men.gov.pl/index.php?option=com_content&view=article&id=2979%3Adymy-do-lepszego-nauczania-historii&catid=125%3Aksztalcenie-i-kadry-aktualnoci&Itemid=76



RIGHT-WING
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OR PATRIOTISM

The proposals of curriculum reform became the central point of the media debate after the hunger strike of the former members of 1980s opposition in Cracow. Yes, a hunger strike. We witnessed the first hunger strike against changes in school curriculum in the history of Poland. The opposition stated that the new curriculum was leading to "dehumanization" and dedicated the strike to God. The protest expanded to other cities where former anticommunist activists from *Solidarność* disapproved of the changes. Most of them were not experts, teachers, or scholars. None of them were students or parents of students. If anything, they could have been grandparents⁵.

⁵ Szpunar, O. and Kuraś, B. (2012) "Głoduja dla historii, strajk dedykują Bogu", [in:] *Gazeta Wyborcza*. March 19. Available [online]: http://krakow.gazeta.pl/krakow/1,44425,11375664,Gloduja_dla_historii___strajk_dedykuja_Bogu.html

The politicians associated with the right wing, especially from Law and Justice (PiS), provided a number of arguments against the new curriculum. They had a chance to express their blind nationalistic vision on education. If we put their words into headlines, they could be summarized as “the loss of national identity”, “history is not the teacher of life anymore”, and “history education is the heart of patriotic and citizenship education”. Needless to say, right-wing politicians often have a tendency to use emotionally charged vocabulary when talking about the nation, national identity, or patriotism. The past, especially of a nation, is glorified and regarded as a matter of great importance in the conservative (republican) agenda. Law and Justice politicians also believe in the strong relationship between teaching history and building a strong nation-state. Thus, they were convinced that the reform was a threat to Poland.

An interesting view on the problem of potential weakening of our country was expressed by Jarosław Kaczyński, the leader of Law and Justice: “limiting history education is a postcolonial procedure in order to make the Polish people the labor force for the West”⁶. His argument is grounded in the premise that, due to the changes of history curriculum, Polish students will not be able to compete on the European market. Perhaps it sounds like a conspiracy theory, but it is certain that these politicians believe in what they said.

Anyway, the distinguishing feature of Law and Justice is trying to create an alternative narrative unraveling different types

⁶ Kaczyński, J. (2011) *A Letter to Prime Minister Donald Tusk*. September 17. Available [online]: <http://wybierpis.org.pl/aktualnosci/a,61,list-prezesa-pis-jaroslaw-a-kaczynskiego-do-premiera-donald-tuska-ws-nauczania-historii-w-szkolach.html> (Accessed 20 January 2013). Own translation.



HAVING IN MIND
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AND THE NATION-
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ARE THE CORE
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IT IS NOT SURPRISING
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CONDEMN A MORE
LIBERAL APPROACH
TOWARD HISTORY
EDUCATION

of threats Poland supposedly faces. They try to find enemies where they cannot be found, and if they fail in their attempts, they create them – a common populist practice. For instance, Ryszard Proksa, the chairman of the domestic department of education in *Solidarność* once said: “the reform of the Ministry of National Education practically obstructs the Polish students to compete on European job market. Educational system in Poland has been totally destroyed today”⁷. Accord-

⁷ Pezda, A. (2012) “System edukacji w Polsce zniszczony – związkowcy przeciw reformom rządu”, [in:] *Gazeta Wyborcza*. May 7. Available [online]: <http://wyborcza>.



ing to Ryszard Terlecki, a Law and Justice deputy and a history professor, "one wonders whether it is only the effect of incompetence, naïve light-heartedness of the Ministry of Education, or rather purposeful intention to make Polish people less competitive on the European labor market"⁸. It is, however, worth mentioning that none of the politicians explained why or how the changes in history curricula bring about lesser competitiveness of the Polish students in finding a job in Europe or elsewhere. Perhaps they only want to draw potential voters' attention using emotional language and show a false connection between historical knowledge and vocational opportunities. At the same time, they did not back their claims with any data or research which would support their statements about the connection between historical knowledge and strong nationhood.

The former Minister of Education, Katarzyna Hall, who was responsible for the introduction of the reform, posted in 2012 on her blog an entry in which she tried to defend the reform against the accusations made by Jarosław Kaczyński: "I inform you that the graduates hardly know history! They have been taught on the basis of an old curriculum which has not been changed for 12 years, as a result of which students have gross historical ignorance, especially about Poland"⁹.

pl/1,76842,11677331,System_educacji_w_Polsce_zniszczony___związkowcy_przeciw.hwtml

⁸ Polish Press Agency (2012) *Komisja edukacji za odrzuceniem projektu ws. nauczania historii*, September 13. Available [online]: <http://wiadomosci.onet.pl/kraj/komisja-edukacji-za-odrzuceniem-projektu-ws-nauczania,1,5244872,wiadomosc.html>. Own translation.

⁹ Hall, K. (2011) Answer to Jarosław Kaczyński on Katarzyna Hall's blog, September 17. Available [online]: <http://katarzynahall.blogspot.com/2011/09/jarosaw-kaczynski-broni-nieznamosci.html>. Own translation.

Jarosław Kaczyński hurried to assure Madame Minister: "If we win the elections, what I truly believe in, and if we do not change these decisions right now, we will change them then for sure. There will be normal history and Polish language curriculum equal for all students, and one that serves to build a community, common notions, culture codes, because it is more than necessary"¹⁰. And he kept his promise when Law and Justice came to power in 2015.

...AND THEN THERE CAME THE GOOD CHANGE

Education is an important issue in Law and Justice's program. The party emphasizes the role of patriotic education which should be introduced into schools from the earliest years. Having in mind that patriotism and the nation-state are the core issues of the Law and Justice program, it is not surprising that politicians condemn a more liberal approach toward history education. They also reject pluralism and recognize only one version of truth and reality. Their version.

Since they came to the power in autumn 2015, they introduced reforms which are not always consistent with the rules of liberal democracy nor common sense. The politicians of Law and Justice admit that they intend to change Poland for good and for better.

Especially the reforms in education reflect their closed-minded vision of reality.

First, the "Good-Change Reform" in education was introduced very fast, without backing it with any empirical data or diagnosis supporting this dramatic change.

¹⁰ Polish Press Agency (2012) *Kaczyński: Polska nie chce być ani zasobem, ani kolonią*, March 29. Available [online]: http://wyborcza.pl/1,76842,11444295,Kaczynski_Polska_nie_chce_byc_anizasobem__ani_kolonia.html. Own translation.



SIMPLY PUT, LAW AND JUSTICE WANTS TO BRING BACK THE SAME EDUCATION SYSTEM AS IN THE COMMUNIST TIMES

Second, the Ministry of National Education did not discuss the planned changes enough with the interested parties (e.g., parents, trade unions, teachers, scholars). Third, the whole reform did not meet with the general approval of teachers and parents, who organized protests in many Polish cities.

The draft reform, which will be introduced on September 1, 2017, posits to abolish lower secondary school (middle school) and extend primary school from six to eight years. The education in the upper secondary schools will then last four years (now it is three years). As a matter of fact, this decision rolls back time the educational system significantly and does away with the output and achievements of many teachers, school experts, and students. Simply put, Law and Justice wants to bring back the same education system as in the communist times. The reform, which shall be completed by 2022, is perceived by most teachers, parents, experts, and scholars as an introduction of “chaos” in the curriculum itself and education system as a whole¹¹.

¹¹ Suhecka, J. (2017) “Reforma edukacji. Zamiast grafenu – przeróbka węgla. Naukowcy krytykują podstawy programowe. Czego nie nauczy nowa szkoła?”,

The experts suggest that the curriculum is not up-to-date and needs to be overhauled. At the same time, it is difficult to evaluate the proposals of the history curriculum because the Ministry of National Education made available only the draft curricula for the elementary school from the 4th to 8th grade. Judging only on this basis, at first glance the history curriculum appears to be very general and does not include any controversial issue. It is quite correct, traditional, and it emphasizes the chronological method of teaching. Due to history lessons, students are expected to develop a patriotic attitude which is supposed to be the core issue of historical education after the reform. It is not so bad as long as patriotism is not mistaken with chauvinism, racism, or xenophobia. Nevertheless, a potential threat seems to be underpinning it – the fact that history education will begin to focus on patriotism only, neglecting historical inquiry, thinking, and narrating. Developing national loyalty is not a bad idea in theory. In fact, young people must be equipped with some values to live in a complex world. However, those values should not lead to blind patriotism, chauvinism, and xenophobia. If the “Good Change” history curriculum were to contain highly selective facts and was limited to the data, the students would learn distorted history. Moreover, without developing critical and historical thinking, the young generation will be deprived of independent reasoning. Perhaps educating subdued and subordinate citizens is the goal of the “Good-Change Reform”. It would be undoubtedly compatible with the political vision of Law and Justice.

[in:] *Gazeta Wyborcza*, February 2. Available [online]: <http://wyborcza.pl/7,75398,21341358,zamiast-grafenu-przerobka-węgla-naukowcy-krytykuja-podstawy.html>; <http://niedlachaosuwszkoie.pl/index.php/74-zapasc-edukacji-skutki-deformy>



EMPHASIZING
HISTORY,
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AND THE POLISH
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One could have a *déjà vu* observing the heated debate surrounding the forthcoming Good-Change reform. When the education bill was adopted in the Parliament, the opposition (mainly the formerly ruling Civic Platform) cried as if it was “the blackest day for Polish education”¹². The governing party, however, frames the reform as a return to “normal Polish schools”¹³. Law and

¹² Polish Press Agency (2016) “Będzie likwidacja gimnazjów, Sejm przegłosował reformę oświaty. Opozycja: ‘najczarniejszy dzień polskiej edukacji’”, [in:] *gazeta.pl*. Available [online]: <http://wiadomosci.gazeta.pl/wiadomosci/7,114884,21121667,bedzie-likwidacja-gimnazjow-sejm-przeglosowal-reforme-oswiaty.html>. Own translation.

¹³ <http://niezalezna.pl/89948-minister-zalewska-odklamuje-medialne-informacje-ws-reformy-szkolnictwa>

Justice MP Dariusz Piontkowski, also a history teacher in a lyceum (upper secondary school), said: “We are bringing back the teaching of history. We are bringing back patriotic education”¹⁴. Well, it is not true that the former government underestimated the history course in schools. Contrary to this unfounded belief, history has been always treated with dignity and respect in Polish schools. At the end of the lower secondary education, the historical knowledge is assessed during the final exam, what is not common in other European states¹⁵.

According to Sławomir Broniarz, the President of the Polish Teachers’ Union (ZNP), “The direction that the Minister of Education proposes is a nationalist, xenophobic direction”¹⁶. He criticizes the idea of increasing the number of hours for history classes in schools. “Emphasizing history, literature, and the Polish language is essential, but these subjects cannot dominate the education system. No one has ever received a Nobel prize in Polish history! We have received Nobels in physics, chemistry, in economics – these are the most important”¹⁷ – he added. The opposition accuses Law and Justice policymakers of marginalizing science. Others go further and start to panic that we will have to move teaching the “real” history (not the version of Law

¹⁴ <http://videosejm.pl/video/16842-posel-dariusz-piontkowski-wystapienie-z-dnia-14-grudnia-2016-roku>

¹⁵ Podemski, P. (2013) “Historia dla Europejczyków? Dwa paradygmaty edukacji historycznej w Europie a nauczanie wspólnej historii”, [in:] *Historia ludzi. Historia dla ludzi*, (eds.) I. Chmura-Rutkowska, E. Głowacka-Sobiech, I. Skórzyńska Kraków: OW Impuls; J. Lorenc, K. Mrozowski (2013) “Angielski a polski model edukacji historycznej. Wybrane problemy”, [in:] *Historia ludzi. Historia dla ludzi*, (eds.) I. Chmura-Rutkowska, E. Głowacka-Sobiech, I. Skórzyńska. Kraków: OW Impuls.

¹⁶ <https://www.yahoo.com/news/thousands-polish-teachers-protest-against-education-reform-184216340.html>.

¹⁷ *Ibid.*



IT IS A MATTER
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OF A GOVERNING
PARTY

and Justice) underground. The political debate has erupted again, but the actors switched roles. Those who lamented and were alarmed a few years ago now calm public opinion, while those who restrained themselves from emotional discussion are now losing self-possession.

WHAT DOES THE GOOD-CHANGE REFORM ENTAIL?

Since humanities and social sciences are equally important, it is naïve to think that the more hours of history education the students have, the better citizens they are. As it was already mentioned, there is no evidence to support this thesis. It must be borne in mind that the line between education and indoctrination can be sometimes very thin, and there is a risk that instead of history education, students would be taught a skewed nationalistic vision.

Let us emphasize that the final effects of history education depend on the teachers – how they work, what they say, what kind of ideology they bring into the classroom.

It is also important to remember that a history degree requires the holder to pursue certain methodology and objectivity. It is a matter of choice what each teacher wants to be – an independent discoverer of the past or a subjected clerk of a governing party. Therefore, it may be difficult to predict how history will be taught in Polish schools when the reform will be introduced for good.

What will certainly need to change are the handbooks. Moreover, as we already know, it will be the teachers who are to play a crucial role in selecting the historical facts and problems which shall be discussed on the basis of the newly compiled materials. Let us hope that teachers will have the possibility to discuss controversial issues as well – that they will not have to keep this knowledge under wraps. Let us hope because I personally know that this has happened before. I was repeatedly told stories by my older colleagues, relatives, and parents about the times when teachers had to whisper the inconvenient facts (from the point of view of the authorities) in the classroom or outside of school altogether (e.g., dealing with the aggression of the Soviet Union toward Poland). Back then it was the communism and not the truth that prevailed.

The first main change proposed by Law and Justice was to divide “history and society” into two separate courses. The students will start learning history in the fourth grade (no change here), focusing on different developments in Poland and elsewhere. In the following four years, they shall acquire a thorough knowledge en-

compassing the ancient to contemporary times. Right now in the lower secondary school (gymnasium), students are taught history from the ancient times to the First World War. Then they move to the upper secondary school (lyceum or vocational schools) where history from the 20th and 21st centuries is introduced.

Therefore, it is not surprising that policymakers and politicians from all political spectra would love to pursue their own historical policy by selecting facts, dates, and heroes according to their worldview. For instance, the name of Nobel Peace Prize laureate and former President of Poland Lech Wałęsa does not occur anywhere in the new national curriculum – even when the *Solidarność* Movement is mentioned. His name is also omitted in the part of the curriculum which reads: “The figures and events important for building the Polish cultural identity”. The names of renowned individuals that do appear on the list that follows include: the first king of Poland Bolesław Chrobry, Pope John Paul II, Witold Pilecki – one of the so-called “cursed soldiers”, among others. Next to *Solidarność* no name is listed, only an enigmatic and generic remark of “and their heroes”. The policymakers either left the decision of which figures to choose to a historical authority, or more probably they simply do not want to promote Wałęsa as a national hero.

Although it seems that presenting the heritage of the most accomplished Polish figures and events is a good idea, the draft curriculum does not give a complete overview. For example, policymakers for some reason failed to include in the curriculum the only victorious Polish uprising – the Greater Poland Uprising (1918-19). On the other hand, the topics which seem to be too complicated for children in elementary

school do occur – for instance, the figure of the abovementioned Witold Pilecki or the extensive details of history in the Jagiellonian era.

THE REASONS TO DOUBT THE GOOD INTENTIONS OF THE REFORM

Although it goes without saying that every government has the right to pursue their own policy toward history, especially at school, we may have serious doubts about the appropriate historic narratives in Polish schools under the government of Law and Justice. Why? Let us refer to one telling example.

Polish authorities were the organizers of the NATO Summit in Warsaw on July 8-9, 2016. The event was accompanied by an exhibition devoted to the history of Poland in NATO. It featured 14 photographs of tanks, ships, soldiers, and several politicians. Although this alone is not a reason for controversy, the individuals shown on the photos actually evoked in the public opinion a wide range of emotions. The images featured: Jan Olszewski¹⁸ (former prime minister of Poland, an icon and the hero of Law and Justice), Lech Kaczyński¹⁹ (former president of Poland), and Andrzej Duda, the current president. Clearly, the leading politicians who were responsible for introducing Poland to NATO were not included in any of the photographs and thus the role of such individuals like Lech Wałęsa, Bronisław Geremek, or Aleksander Kwaśniewski was overtly undermined, almost as if they were forgotten.

¹⁸ Jan Olszewski, an icon and a hero of Law and Justice. Although he has merits, there is no direct connection between his activities as a prime minister and the Polish accession to NATO.

¹⁹ President Lech Kaczyński died in a plane crash in 2010. He was the twin brother of the current Law and Justice's leader, Jarosław.



Though Law and Justice may not be rewriting the most recent history of Poland, they try to introduce an alternative interpretation. A false interpretation. The ruling party uses the method of history eraser – its politicians are “cleaning” the facts in a bid to change the current historical reality. To make their attempt more efficient, the best solution for them would be to set up the Ministry of Truth which would regulate and control the new historical order. But let us not give them any ideas.

Although there is a perpetual discussion about the amount of science and the humanities in the school curricula, the balance between the two is yet to be found. The latter teaches us how to think, how to draw conclusions, how to speak and even dream. If the new government wants to introduce more time devoted solely to history to schools - it is not really such a bad idea, as long as this will result in pupils acquiring a broader perspective and gain access to a bigger picture where the past meets present and future. This means that teaching history should include the history of women, minorities, controversial figures, and events. History is not only about wars (victories and failures) but also about everyday life, which is neglected in the new curriculum draft. The policymakers focused (yet again!) on military aspects and forgot about social and economic issues and inequalities and differences in the societies of the past. Moreover, the history lessons will continue to focus on heroes and not on the lives of ordinary people.

The recent debates in Poland have shown that state education and schools may easily become the instrument of political ideologies. The saddest thing is that nobody is listening to scholars, experts, and teachers who composed an extensive list of numerous errors that occur in the new curriculum

(including factual mistakes, recommendation of archaic texts for students, and a lack of different sources for students to compare)²⁰. Experts from the Polish Academy of Sciences state that “the most alarming issue is pretending that the education will change while the traditional program and the teacher-oriented approach will be reasserted. Moreover, students will be taught a subdued attitude toward authorities, past-oriented thinking, while freedom, decision-making, and building a personal system of values will be undermined”²¹.

It seems that Minister of Education Anna Zalewska has blocked her ears on any rational arguments. “I know better” seems to be her slogan. Well, as George Orwell once wrote, “ignorance is strength”.

When Civic Platform introduced the changes in curricula, their politicians also experienced some problems with communicating its purpose to the public. Although the newly introduced changes may be perceived as a good solution, in the preceding debate the Law and Justice politicians did not refer to any sound evidence or data to support their claims – instead, they chose to employ a strong, emotional appeal and a number of empty words. Thus the change in the history curriculum was neither explained nor justified to public opinion. What became evident is that education is a tool for maintaining control over the hearts and minds of the society.

²⁰ <http://www.tokfm.pl/Tokfm/7,103085,21351262,skola-ma-wykształcić-elektorat-pis-profesor-z-kul-u-mocno.html>; <http://biqdata.wyborcza.pl/czego-nauczyc-twoje-dziecko-szkola-pis-a-czego-sie-juz-w-niej-nie-dowie>

²¹ Wittenberg, A. (2017) “Eksperci alarmują: MEN udaje, że zmienia podstawy programowe”, *GazetaPrawna.pl*. Available [online]: <http://serwisy.gazetaprawna.pl/edukacja/artykuly/1016450,men-zmienia-podstawy-programowe.html>. Own translation.

WHY DO PEOPLE BELIEVE POPULISTS?

Many people seem bewildered by why the clearly populist parties have been recently winning in numerous democratic countries worldwide. Why does the United States have Donald Trump, why is Poland ruled from the sidelines by Jarostaw Kaczyński, why does the United Kingdom have Nigel Farage, and why should France be wary of Marine Le Pen? The answer is a simple one: because the contemporary elites in these countries do not communicate with the masses. They do not listen to what pains them. They know better. And on top of that, they talk in their own language which does not help to garner support for their supposed knowledge. People would rather turn to those who speak their own language, who understands their fears, lifestyles, their hopes and dreams. Populists have the talent to show that they are empathetic (maybe they really are?) and that they know how ordinary people must cope with reality. The populists are strong because they do not correct people's attitudes (by calling them "homophobic" or "racist" if they are not sure about their feelings toward gay marriage or immigrants); instead, they promise to find them jobs (for example by removing immigrants). They may not care about doughnuts in school shops or about the amount of sugar children are drinking, but what they do promise is that every parent will receive financial support from the state (and thus further increase public debt, but who cares about that?). They do not condemn people if they are eco-ignorant. They promise that they will take care of every family and do not teach and preach how to be a good parent. They will remain in power as long as they can criticize Islam and do not get branded as "Islamophobic". They will have support until it turns out that they actually have nothing to offer those who believed them.

Why am I writing about this here? Well, because it is about our history. It is about the relationship between the everyday reality of an ordinary person and the decisions made by politicians. It is our life, our story, which will be history for our descendants. They will be forced to identify heroes and villains, who was right and who was wrong. But they need to have access to different sources and be able to think critically. We need to remember this now when we are making his- (or rather our-) story. History can teach how people made their decisions and how they shaped the past. That is why it is so important to show the young generation how to use different materials and sources, how to recognize alternative and false materials, how to defend themselves against manipulation and indoctrination. Unfortunately, it appears that in order to shape their prospective electorate the Law and Justice government will deprive Polish students of a basic understanding of ideas such as pluralism and freedom. ●



DARIA
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Hungarian Illiberal Democracy and the Role of Children



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GÁBOR
HORN

It is commonplace that a state's success, from the point of view of economy and social stability, depends on its youth. And the key to future generations and forming how they see the world is in education. At the end of the 1980s, the countries which freed themselves from Soviet authority faced the challenge of reforming educational policy that had until then rested on communist principles. Now, they had to develop a society open to democracy and capable of establishing and maintaining it. The expected breakthrough, however, has not happened.

Using Hungary as an example, the opposite of those aims have happened due to the conservative/right-wing government coalition. The regressive effects of this situa-

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THE NORDIC
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tion have been shown in the results of the 2016 PISA test. The results make the review of Hungarian education policy more urgent than ever. The world acknowledges the success of the Nordic educational systems (especially Finland). Moreover, several OECD countries demonstrated an incredible improvement in recent years. As for Hungary, the tendency is the opposite: the results of the 2016 test astonished even the experts, despite the worsening tendency of the past years. They show a devastating picture of the country's educational system.

ASPIRING TO A NORDIC EDUCATION SYSTEM

The Nordic education models and their education policy show that the implementation of liberal principles has a great impact on the development of public education. The economic and social stability of a country that excels in PISA tests and other independent international surveys, as well as the citizens' standard of living show that the liberal practices make a country's society work well and creates an opportunity to develop the human capital necessary for economic development. In contrast, Hungary almost completely lacks that human capital. And with regard to democracy in Hungary, the situation could hardly be more devastating. According to a 2014 survey from the research group Active Youth¹, almost two-thirds of Hungarian young people doubt a democratic political system would be better than a dictatorship.

Apart from Finland, there is another country worth analyzing in a greater detail because it reinforces our assumption about the necessity of liberal principles in education policy. Estonia presents a shining

¹ Szabó, A. (2014) *Racionálisan lázadó hallgatók II. Apátia – radikalizmus – posztmaterializmus a magyar egyetemisták és főiskolások körében*. Budapest/Szeged: Belvedere Meridionale – MTA TK PTI.

counter-example to Eastern European countries moving to the right especially because it achieved remarkable success in a few decades after regime change that had serious economic and social impacts.



THE CURRENT
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NEW GENERATIONS
FROM THE POSSIBILITIES
OF INNOVATION
AND CREATIVITY

Estonian education policy is the result of a wide consensus among governments and political ideologies which aims to serve its citizens rather than the political leader-

ship. An effective integration policy made it possible to avoid social differences between children within a classroom. In other words, students with poorer backgrounds have equal opportunity to perform well in school and advance in society as do their peers with better family circumstances. Estonian public schools do not separate those who perform worse, but they make an extra effort to help the pupils catch up with the others².

We can continue listing the characteristics and merits of the Estonian education policy, but one conclusion is clear: an efficient liberal education policy serving current demand is the backbone of a well-functioning and developing economy and society. PISA results of the country support this claim.

EDUCATIONAL CHALLENGES IN HUNGARY

On the other hand, the deficiencies of the Hungarian educational system become apparent beyond PISA results. Overloaded children, teachers, and parents who demonstrate for months and express their dissatisfaction prove that education in Hungary today – similar to many post-socialist countries – is not able to provide its participants with what is needed to ensure development and social stability.

In the years after the change of the regime there have been some significant reforms within education, but due to different opinions of various governments, the reforms were not able to become successful and had little impact in society.

The first Orbán government, in power from 1998 to 2002, had indicated that they shall not tolerate the previous government's liberal measures for symbolic and political

² See: Mihkel Lees's article featured in this issue: *Estonian Education System 1990-2016: Reforms and Impact*.

reasons. So rigid control over educators and emphasis on frontal instruction came back, while programs for developing IT skills were abolished. The situation became even clearer after the current prime minister's second win: despite the convincing arguments for a liberal education policy, the right-wing Christian conservative leadership sees the success of Hungarian education through institutional centralization and uniformity.

The only explanation for this can be that the government sees the role of education differently from how it should function in a 21st-century European country. The aim of the current government is to create and maintain a class system burdened with inequalities which would preserve the power of the political elite and keep new generations from the possibilities of innovation and creativity. In parallel to this approach, Hungary exhibits a total centralization of the education system, depriving municipalities of their means and taking away the freedom of education workshops.

THE EDUCATION POLICY OF ILLIBERAL DEMOCRACY

After the fall of communism and the democratic transition in 1989, the Hungarian socialist-liberal coalitions in power³ had the objective to include international practices in Hungarian education (e.g., civic education, more independent and decentralized public schools) to enable democratic development and to catch up with the West. Therefore, the measures and programs which were born between 1994 and 1998 emphasized the fight against segregation of Hungarians and Roma people, accommodation to the rapidly changing global political and economic situation, and



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VIKTOR ORBÁN
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TO WORLD WAR II

changing labor market needs. Globalization, digitalization, and advancing technology require different knowledge and individual skills. Thus, a new type of education is needed, different from the methods and curricula from the past.

Those states that are willing to keep pace with this rapid development and create a stable and fair social situation need to form their education policy accordingly.

³ The MSZP-SZDSZ coalition first came to power in 1994.

The Orbán-led Fidesz party, however, withdrew vital measures based on liberal principles in 1999, when the socialist-liberal coalition was defeated. Considering the Fidesz-KDNP coalition's measures related to education, the government's goal was to do whatever it took to extinguish the last spark of liberalism in Hungarian public schooling.

The second Orbán government, which came to power in 2010, distanced itself on an ideological level and on an active level from previous trends, which had a greater tradition in Western European education than in Hungary. Viktor Orbán's statements and the personal beliefs of the people he nominated for leadership posts in public education demonstrated the change in the direction of education policy. The new regime criticized competence-based education and emphasized the importance of "basic knowledge" according to traditional Prussian values, which entails inter alia frontal teaching and memorization as a learning method.

The illiberal state proclaimed by Prime Minister Viktor Orbán represents a permanent political pursuit of restoration in practice: experiments to bring back authoritarianism in politics and social interactions typical prior to World War II. The nostalgic and sentimental feelings regarding the Horthy era permeate everyday life. They are at the same time anti-democratic, since the period considered exemplar in Hungarian history is about strong segregation in education and serious limitations on basic human rights; as such, it was perfect ground for Nazi ideology. This era is characterized by an authoritarian educational system which, until 2010, no Hungarian government after the democratic transition considered as an example to follow. However, this is not evident anymore. Now in Hungarian schools

there is retrograde, direct instruction and passive learning, which have been proven as a false direction by academic research⁴.



ONE OF THE
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AND ECONOMIC
ELITE

To understand the Orbán government's attitude to education and power, we shall take (a non-exhaustive) stock of educational measures put into action since 2010. Reducing the capacity of secondary grammar schools for the benefit of vocational

⁴ See: Benware, C.A. and E.L. Deci (1984) "Quality of Learning with an Active versus Passive Motivational Set", [in:] *American Educational Research Journal*, 21(4), p. 755; Hwang, N-Ch.R., Lui, G. and M.Y.J. Wu Tong (2005) "An Empirical Test of Cooperative Learning in a Passive Learning Environment", [in:] *Issues in Accounting Education*, 20(2): pp. 151-65.

schools and decreasing the compulsory schooling age from 18 to 16, the Orbán government reinforces the social segregation of already disadvantaged people. Although the fight against social segregation in Hungary was never as efficient as the closed social stratification would have demanded, the abovementioned measures serve the purpose of the government conserving this class system. One of the fundamentals of illiberalism is to preserve control over social mobility, which ensures that power is centralized in the current political and economic elite. A study published in 2015 by a research group at the Hungarian Academy of Sciences shows that the rate of segregation in terms of social class and status is continuously increasing in Hungarian schools⁵.

RESTRICTED SOCIAL MOBILITY

Apart from preventing or hindering social mobility, schoolchildren from higher social classes also suffer disadvantages due to changes within the education system. Although it is true that the performance of pupils from vocational schools plays a significant role in deteriorating overall performance, it cannot be the sole explanation for the tragic results in the international tests. Competence assessment – as it attempts to react to the challenges in real life – demands skills which Hungarian children are lacking. For instance, the deficiencies in digital literacy are not being tackled by the current curriculum. Quite the contrary: the number of IT education classes have been drastically reduced in order to have space for more physical, Christian, and moral education classes.

Based on the statements of government representatives and experts close to the decision-makers regarding PISA results⁶

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THE RELATIVELY
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AND VOCATIONAL
SCHOOLS)
OPERATED
BY MUNICIPALITIES
HAD THE OPPORTUNITY
TO REACT
TO PROBLEMS
AND DEMANDS
QUICKLY
AND EFFICIENTLY

⁵ Varga, J. (2015) *A közoktatás indikátorrendszere*. Budapest: MTA KRTH KTI.

⁶ According to the Ministry of Human Capacities, the

we can conclude that the leadership does not consider it a problem that Hungarian children's digital competence lags behind that of the neighboring countries. All the changes in the world are connected to digitalization and technological development, and it is almost impossible to succeed in the labor market without IT knowledge. Meanwhile, even solving basic exercises as a part of the competence survey conducted via computers poses a real challenge to Hungarian children.

There is therefore a huge demand for motivated and well-trained educators who could provide pupils with education that prepares them for real-life challenges. However, the burden (more compulsory hours and administrative tasks) imposed on educators has increased to the extent that teachers have neither the time nor the energy to help students falling behind or to transfer knowledge beyond the compulsory curriculum. A well-observed increase of the teachers' burdens only reinforces their dependency on the state, which already exists due to a continuous and forceful centralization of education system.

LIMITING TEACHERS' AUTONOMY

The relatively independent and autonomous institutions (primary and secondary schools, secondary grammar schools, and vocational schools) operated by municipalities had the opportunity to react to problems and demands quickly and efficiently. The result of the government's centralizing policy is that the schools have been taken out of the jurisdiction of those familiar with the local situation. Now, even the supply of light bulbs depend on a mammoth organization. Principals are not appointed by educators familiar with the local conditions, but the Ministry of Human Capacities, which does not confer enough power

capitalize Digital tests were unusual for pupils.



NOW, FINAL DECISIONS ABOUT EDUCATIONAL MATTERS ARE MADE BY PARTY POLITICIANS LACKING RELEVANT EXPERIENCE WHO IMPLEMENT GOVERNMENT DIRECTIVES WITHOUT ANY PROFESSIONAL EXPERTISE

in its own appointees to give them rights to hire and fire. Those rights are exercised by district leaders. In an ideal situation, a school is a dynamically developing institution based on its citizens' equal partnership. Today, however, parents, teachers, and students feel they are destined to a common fate only inasmuch as they are all subject to and suffer from the central educational directive.

Compared to the conditions before 2010, this centralization process represents a huge step backwards: the liberal education policy empowered the National Public Education Council with 20 members, out of whom only three are nominated

by the ministry, with veto rights, ensuring autonomy within this professional organization. Previously, the members of the National Public Education Council have been elected by professional organizations, institutes of teachers' training, and the Hungarian Academy of Sciences. Now, final decisions about educational matters are made by party politicians lacking relevant experience who implement government directives without any professional expertise. Almost no communication occurs with professional organizations such as unions or subject teachers' voluntary associations.

With regard to school or educator autonomy, we are not only talking about the fact that the institution is not able to satisfy its own demands out of its own resources. It is also about a certain ideological indoctrination. The market-based choice of textbooks was replaced by unified national textbooks, thus making the teaching materials (which were widely criticized based on content and methodology) compulsory by destroying the competition is a clear message that the government's ideology has to be infused into the classroom. The plan to merge state and church is outlined in the support for religious schools and in the introduction of ethics classes – or their alternative, religious classes, mainly Catholic. Those measures, apart from curtailing the freedom of conscience, show an over-involvement in the moral education of children. The aim of the government is to transmit its own value system, disregarding the interests of pupils of different religions or atheists.

We do not dispute the right to maintain religious schools, but an intertwining of church and state of this proportion violates the basic principles of a secular state in a 21st century democracy which cannot be allowed. Merging church and state is also

against the fundamentals laid down in the Hungarian constitution. The state's over-involvement in the moral education of children and their education *per se* does not only happen in ethics and religious classes – the National Curriculum valid from 2012 also features this trend.

The measures listed here and present since 2010 demonstrate how and in what form the Hungarian government is trying to fight liberal educational principles and their impact in society. The right-wing Christian-conservative leadership has voiced its opinion about liberalism countless times. In 2015, Viktor Orbán labelled the system he planned to introduce as illiberal democracy. The actual task of the Hungar-

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ian education system, instead of preparing students for real life, is to adjust them to an authoritarian and rigid system known from dictatorships.

After 2010, the Hungarian government's legislation in various fields does not follow policy interests, but political, legislative, and decision-making processes according to power preference. This tendency can be observed in different areas of life, not only in education policy. The worsening of the situation of sectors subject to arbitrary restrictions, is by all means a reason to worry – not only from the point of view of this country, but of the region.

Nevertheless, it is also true that, from the point of view of the Hungarian society, the educational system will experience the biggest short-term and long-term effects. If the Hungarian government disregards the warning signs that can be deduced from international comparisons, it will have catastrophic consequences on a generation and on the country as a whole. It is clearly visible that the development of new policies serves neither the education, nor the children and the society, but those currently in power.

CRISIS OF DEMOCRATIC VALUES

Unfortunately, the government's education policy amplifies the anti-democratic attitudes which are present due to the lack of a democratic tradition in the country. Hungarian youth cannot rely on becoming acquainted with the basic principles of democracy through a narrowly interpreted socialization because of the historical background. The hypothesis that a democratic system will generate its own democratic citizens is not enough: to maintain this political system, we need to educate politically active and open-minded young people who are aware of the importance of democratic institutions and the need for democracy.



OECD RESEARCH
CONDUCTED
IN 2015 EMPHASIZED
THAT EACH YEAR
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WHAT IS MORE,
STATE EXPENDITURE
ON EDUCATION
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This attitude of a European democratic minimum does not seem to be self-evident in Eastern Europe, and particularly Hungary. Surveys and opinion polls conducted among young people show that a large proportion of them stays passive regarding civic rights and political participation. Moreover, among the minority of active and interested youth, there is a surprisingly large number who do not rule out dictatorship as a possible political system. This tendency coincides with the strengthening of extreme right-wing, exclusionary, and populist parties⁷.

⁷ According to the results of the Magyar Ifjúság Kutatás 2016 (Hungarian Youth Research 2016), 33 percent of the respondents between 15 and 29 years old were indifferent about the political system or would accept dictatorship under "certain circumstances".

CONTINUOUS WITHDRAWAL OF RESOURCES

Withdrawing funds from education played a huge role in forming the abovementioned regressive situation besides the ideological parameters. Even OECD research conducted in 2015 emphasized that each year Hungary spends less and less on education.⁸ What is more, state expenditure on education is the lowest of all OECD countries. The proportion of GDP spent on education decreased after 2010 (i.e., during the Orbán administration) to the extent that not even 2016's real growth could compensate from the point of view of real value. Educators' salaries are extremely low compared to their colleagues in the CEE region, whereas the social prestige of their profession is the lowest in history and cannot be compared to other countries.

Apart from losing their self-determination rights, compromising their freedom as educators, and a severe increase in administrative workload, the profession also faces low salaries. The low remuneration and lack of necessary tools leads necessarily to a poor quality of education. The development of educators, ensuring them the possibility of continuous professional advancement, is generally indispensable when it comes to improving the quality of education.

The International Institute for Management Development shows in its 2015 report that Hungary has lost a great deal of competitiveness compared to its position in 2005⁹. The report takes into consideration the resources put into education, the attractiveness of the cost of living in a given coun-

⁸ If we define the expenditure per student in 2008 as 100, then in 2013 the same index was 82 in Hungary, while 114 in Czech Republic, 123 in Poland and 132 in the Slovak Republic. Source: Education at a Glance 2016 OECD Indicators.

⁹ IMD World Competitiveness Yearbook 2015.

try, quality of life, and the ability to retain a skilled workforce, as well as the degree to which education meets the demands of economy. Hungary was ranked as 16th in 2005 and dropped to 56th in 2015.

CONCLUSIONS

Philosopher Mihály Vajda once said: "Things have taken a terrible direction, but it does not mean everybody should forget about their principles. If others don't need them, let's keep our European values to ourselves. We may need them in the future"¹⁰. It has become clear in Hungary and in other Eastern European countries that standing up for European values in a direct way has become a necessity. To ensure peaceful living as a community and the possibility of further development in the region, we need to protect our values and make them seem attractive.

In order to achieve this, we need to take stock of how far we got from our set goals during the Fidesz government in Hungary and other extremist regimes in the region. We need to restore the confidence in the European Union in those countries for the sake of the continent. Education itself can serve this purpose.

In Hungary, there have been some promising signs from civil society: in the recent period, the stance the teachers took has induced previously unseen activity. The educators are not at war with the government only for a just remuneration, but they also take action for other critical matters. They are protesting publicly on the streets of several Hungarian cities for their educational and professional beliefs to put society on a more sustainable path. Namely, education can ease rigid social stratification and achieve economic prosperity. Parents

¹⁰ Farkas, G. (2015) "Dübörög a demagógia, Európa Orbán nyomában", [in:] 24.hu, July 16. Own translation.

actively taking part in the demonstrations prove that there may be a new approach to democratic participation in the society, according to which a parent is as much a part of the school system as a teacher or a child.

While it is obvious that young people in Hungary today are not in the position to acquire the skills and competences necessary in everyday life, it has become more evident that parents get out of touch with their children's studies during secondary education. The communication between families and school is therefore narrowed down to the electronic school register, despite the fact that parents still play an extremely important role in their children's education at the moment.

The goal of education policy would be to create a school system in which the development of respective institutions is a common concern of students, educators, and parents.

This is in line with another important issue: that the principles of democracy should not be learnt as a dry part of the curriculum from history books, but should be acquired from the real operation of the institution. Constructive involvement in the life of a school, such as creating the possibility to express criticism without fearing the consequences, either as a student or a teacher. A friendly atmosphere, positive attitudes, and education based on teaching skills makes it possible to apply customized educational methods and real and efficient work within the classroom. The responsibility of schools in the 21st century is not to make dependents who subject themselves to the system, but to raise children who, after graduating, live their lives as free citizens fully aware of their rights, duties, and possibilities.

Unfortunately, however, we cannot expect changes or reforms which would put the current situation in public education on

a better track to come from the Hungarian government. The political elites opposing modernization will not be discouraged to step away from its path even due to deteriorating results. The political establishment will pertain to the autocratic way of operating in schools, which is a method characteristic of the whole political arena, and it seems that the political elite is incapable of taking responsibility, too. After the devastating results of the PISA tests, instead of revising their own principles, they have blamed the educators.

Since for the time being we cannot expect improvement in education nor in other areas of politics, we have to ask ourselves: as responsible citizens, civilians, parents, or educators, what is it that we can do for the youth of Europe and to preserve liberal ideas in Eastern Europe? We need to form a dialogue among the countries affected by extremism that endangering education and liberal ideas. We have to fight with all our means to ensure that those principles in education prevail in these countries. That is the only way democracy can survive unscathed against extremist ideologies that are currently being strengthened in Europe. •



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GÁBOR
HORN

Chairman of the Board at Republikon Foundation since 2010. At the time of the regime change, he was a prominent figure of the union movements. After that he joined the SZDSZ (the Alliance of Free Democrats) and became an MP in 1994 and the campaign director of the party. Between 2002 and 2008 he worked as under-secretary for coordination in the Hungarian Prime Minister's office as well. For 10 years, he was teaching economics and finance and then took part in the founding of the Economic Polytechnic Foundation School, where he worked as director of curriculum until 2002.



Education and Inequality: Liberating Schools in Bulgaria



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PETAR
GANEV

It is January 2014. After winning a couple of regional competitions in informatics with the highest score in the country, a 12-year-old boy from Smolyan, one of the poorest regions in Bulgaria, is about to go to the National Olympiad. However, instead of competing on a national level, the boy is disqualified and all rewards from previous competitions are taken away for him. He did not cheat. This kid was dis-

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ONE CAN PLAY
WITH RHETORIC,
BUT BULGARIAN
SCHOOLS ARE
FALLING WAY SHORT
OF EXPECTATIONS

qualified because he was homeschooled – one of a few elusive homeschoolers in Bulgaria and probably the only one in Smolyan. Back at the time, three years ago, such an alternative to the classical school system was not allowed in Bulgaria and homeschooling was considered illegal. This is still the case in most of the countries in the region.

In response to this controversial situation, the mother of the boy publicly stated that the state monopoly in education had been inherited from the communist years and should have been forgotten long ago. She added that the modern school envi-

ronment in the country is degrading¹. If we look at the performance of Bulgarian schools in international rankings, it is hard to oppose her view. One can play with rhetoric, but Bulgarian schools are falling way short of expectations.

Why is this story important? Because it shows the relation between the different opportunities and inequality in the poorest member of the EU and the process of opening up (liberating) schools in Bulgaria for alternatives and informal methods, for innovation and competition, for the local community and businesses. It is a difficult process that started with the reform in 2007–2008 and has continued with the new educational law adopted at the end of 2015 (replacing legislation from the early 1990s).

Nevertheless, four main challenges still lay ahead of the Bulgarian education system: 1) autonomy; 2) flexibility and choice; 3) involvement; and 4) practical skills. One way to look at these issues is to investigate the income distribution in the country, focusing on poor households and the middle class, and evaluate policy shortcomings in light of poverty data and the social dynamics in Bulgaria.

EDUCATION IS KEY

In 2014–2016, the Bulgarian Institute for Market Economics (IME) conducted extensive research on poverty and the main factors that differentiate social and economic status in society. We used detailed data from EU statistics on income and living conditions (EU-SILC). Moreover, the Bulgarian National Statistical Institute (NSI) provided us with all the individual responses for Bulgaria, which gave us the opportunity to explore in great detail the issues of poverty and inequality in the country in

¹ http://www.dnevnik.bg/detski_dnevnik/2014/01/08/2215937_ministerstvoto_otnelo_nagrada_na_momche_spechellilo/

the last several years. Our research identified three factors that lead to poverty in Bulgaria: education, economic activity, and regional status. While they are all of great significance and remain interconnected, our findings show that education has the biggest impact on living conditions in Bulgaria. Education also predetermines the economic status, as there is a very strong relation between educational level and the dynamics of the employment rate.

A FEW METHODOLOGICAL REMARKS

To investigate the main factors that lead to poverty and inequality in Bulgaria, IME constructed an “income distribution curve” (Figure 1), which represents the income of every citizen. On the x-axis we placed several income brackets, while on the y-axis the number of people that fall in every bracket. In this way we may see the entire distribution of income in the society. As a consequence, there are two significant aspects that shall be mentioned.

First, income is understood as “equivalized disposable income”. According to Eurostat methodology, the equivalized disposable income is calculated from the total disposable income of each household (all monetary incomes included) divided by what is called the “equivalized household size”. Thus, the equivalized disposable income is attributed equally to each member of the household, so there is no income difference within a household. This approach represents the basic view that poverty should be explored on a household level because living conditions are formed on the household, not the individual, level.

Second, after testing the data, 26 income brackets were formed, so that a meaningful income distribution is presented. Having fewer brackets means that some of the differences will be hidden, while having more means that the curve is not smooth and the



THE POVERTY RATE IN THE GROUP OF PEOPLE WITH HIGHER EDUCATION IS BELOW 5 PERCENT

analysis problematic. The distribution in 26 brackets leaves us with five brackets under the poverty line. The curve closes after the 26th bracket, leaving a small portion of the wealthiest out of the graph.

INCOME DISTRIBUTION CURVE IN BULGARIA

With that in mind, we can construct the income distribution curve for Bulgaria (Figure 1). The poverty line is also presented at the graph as around 20 percent of the population is below the poverty line or at risk of poverty. Most people are concentrated near and immediately after the poverty line – these are mainly elderly people and pensioners. The visible spike on the way down the curve about twice the poverty line (where the big chunk of employed people falls) is the effect of people working in the capital city Sofia – this is the regional aspect of the issue, as wages in Sofia are much higher than elsewhere in the country [See Figure 1].

The data enable us to divide the income distribution curve by education, economic activity, and regional status. Since education is the leading factor for income inequality in Bulgaria, it shall be the focus of this analysis. In Figure 2 we can see the income distribution curve with the people divided in four education groups: 1) pri-

mary education; 2) lower secondary (basic) education; 3) secondary education; and 4) tertiary (higher) education. The difference in income levels is easily visible and the risk of poverty rate severely increases with a drop in educational level [See Figure 2].

Let us investigate the income distribution curve for the different levels of education. Looking at the group with higher education (Figure 3), it is clear that their performance is far better than the country average. The poverty rate in the group of people with higher education is below 5 percent. We also see that the distribution is much more equal even as far as two or three times above the poverty line. On the basis of the labor market data² we know that, in 2015, employment of those with higher education was as high as 84 percent (in the 15-64 age group) and has never dropped below 80 percent – even during the economic crisis (2009-2010). In other words, those with higher education in Bulgaria are almost always employed and are not among the poor in the country [See Figure 3].

The next group is those with secondary education. Their poverty rate is around 13 percent, almost three times the rate for those with higher education. However, it is still far behind the average for the country. In 2015, the employment rate in this group was around 67 percent. It is important to know that this is by far the biggest educational group in the country (more than half of the employed), so their performance is crucial for the condition of the middle class. Figure 4 shows that the majority of people with secondary education are a bit ahead of the poverty line, but the group quickly diminishes in the higher income brackets [See Figure 4].

The picture changes dramatically when we present those with lower secondary (basic) education. This group is similar in size to the one with higher education, but is far behind in the income brackets. The poverty rate for those with a basic education is around 37 percent, seven to eight times higher than for those with higher education. In 2015, the employment rate of those with basic education was around 32 percent. In other words, those who have only finished 8th grade and never completed secondary education are two-thirds of the cases without a job, and at least a third of them are in poverty. [See Figure 5].

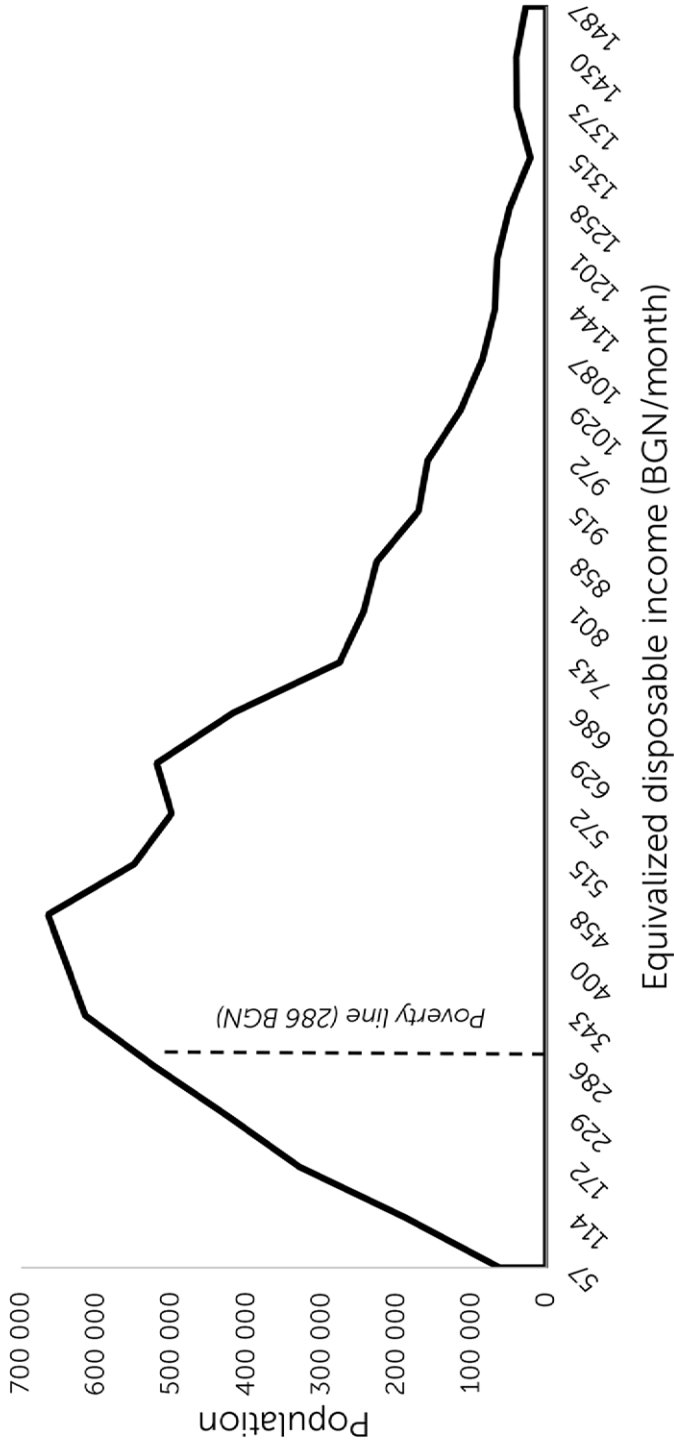
While those with preliminary or even lower education (Figures 5 and 6) constitute a relatively small group, their performance is extremely bad. With an employment rate of less than 20 percent (2015) and poverty rate up to 60 percent, those with just primary education are facing challenges on a completely new level. This is the group where the dynamics between the income brackets is the lowest, meaning that most people in it experience long-term unemployment and remain in deep poverty. [See Figure 6].

TAKEAWAY FOR EDUCATIONAL SHORTCOMINGS

While all these findings may seem obvious, they are often neglected in inequality debates and not properly observed when the educational system of the country is discussed by experts or in parliamentary debates. Using the data presented so far and applying it to the modern educational challenges, we can formulate what should be achieved as far as education policy is concerned to improve the economic performance of those at the bottom of income distribution, as well as the so-called “middle class”. Note that educational levels are understood here as knowledge to be obtained, not as classrooms to be filled – this distinction is important as it opens up the discussion for a wider range of solutions.

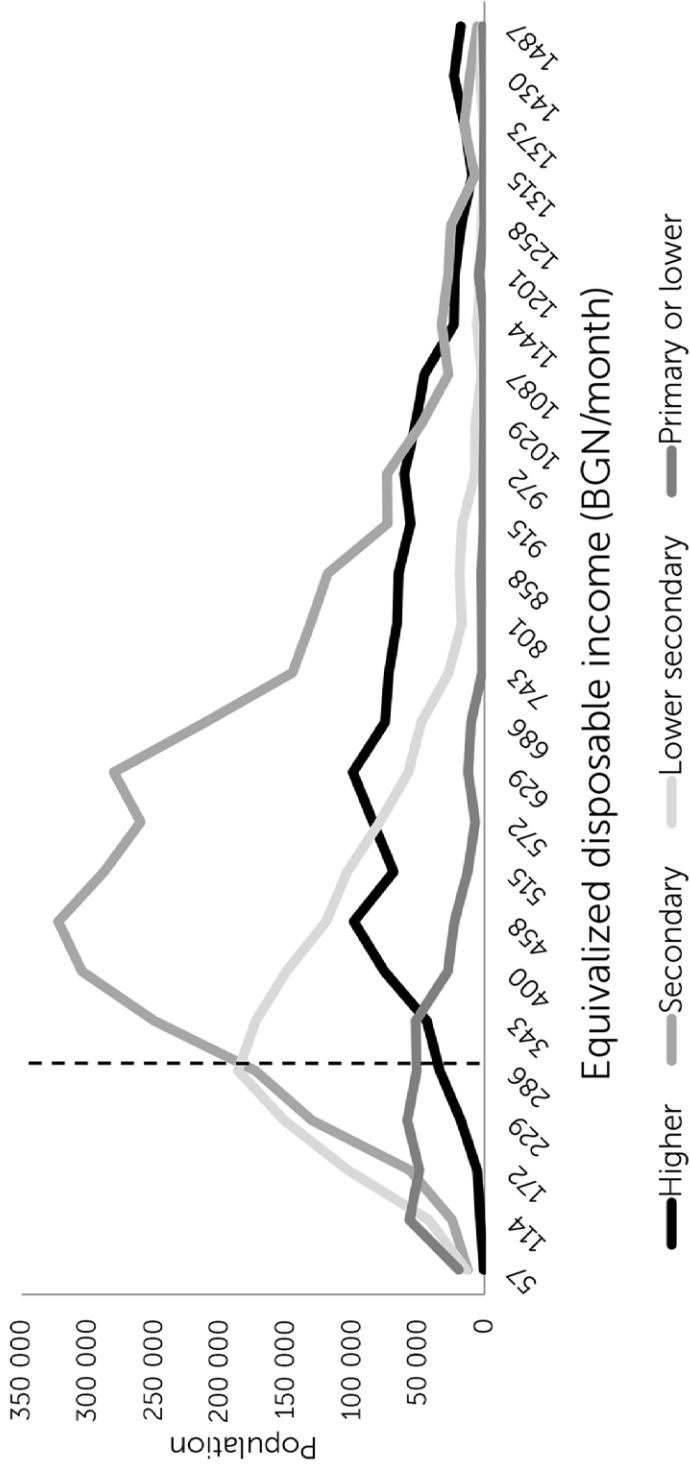
² National Statistical Institute, Bulgaria.

Figure 1: Income distribution curve (Bulgaria 2013)



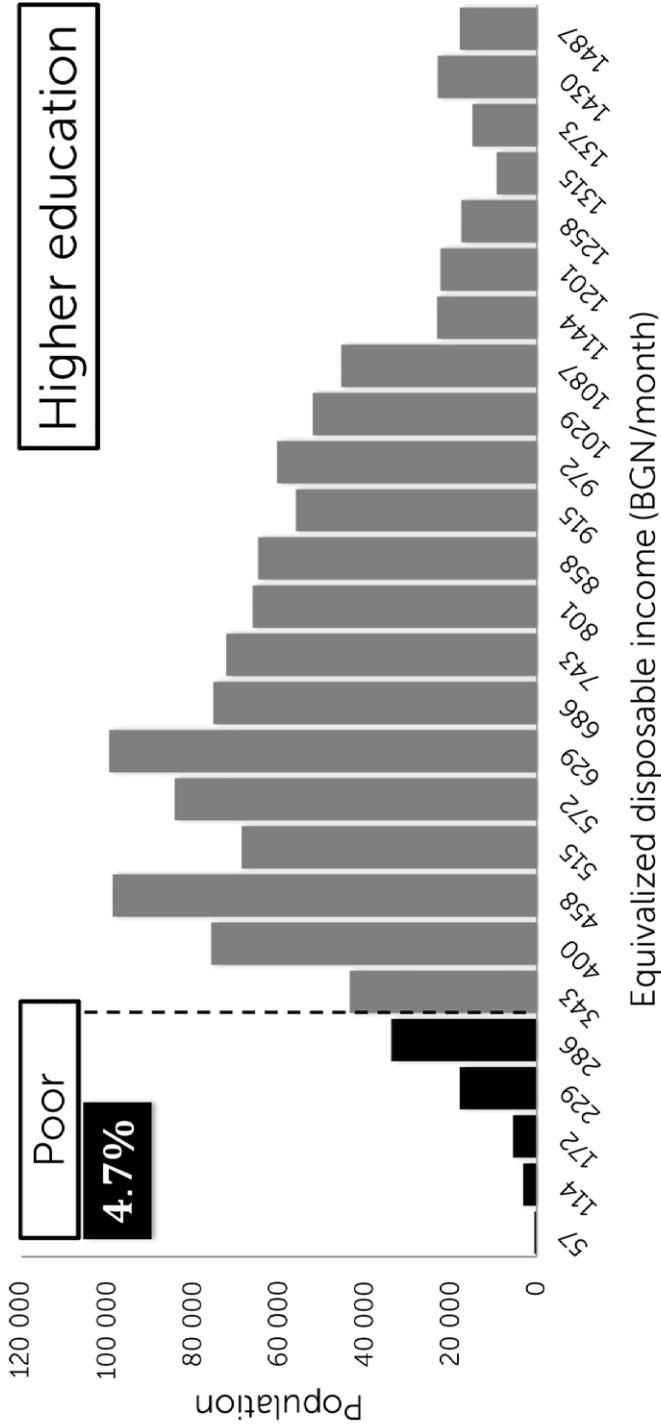
Source: National Statistical Institute (Bulgaria), IIME

Figure 2: Income distribution curve by education (Bulgaria 2013)



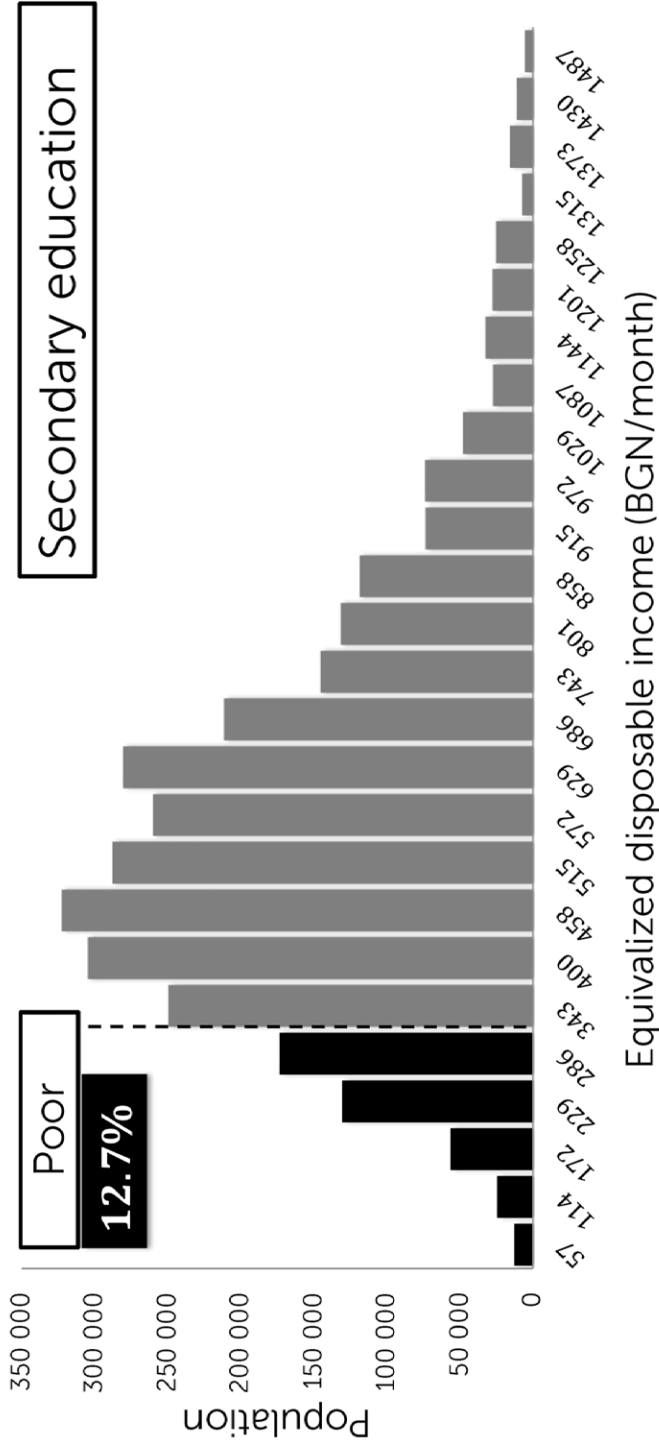
Source: National Statistical Institute (Bulgaria), IIME

Figure 3: Income distribution curve – higher education (Bulgaria 2013)



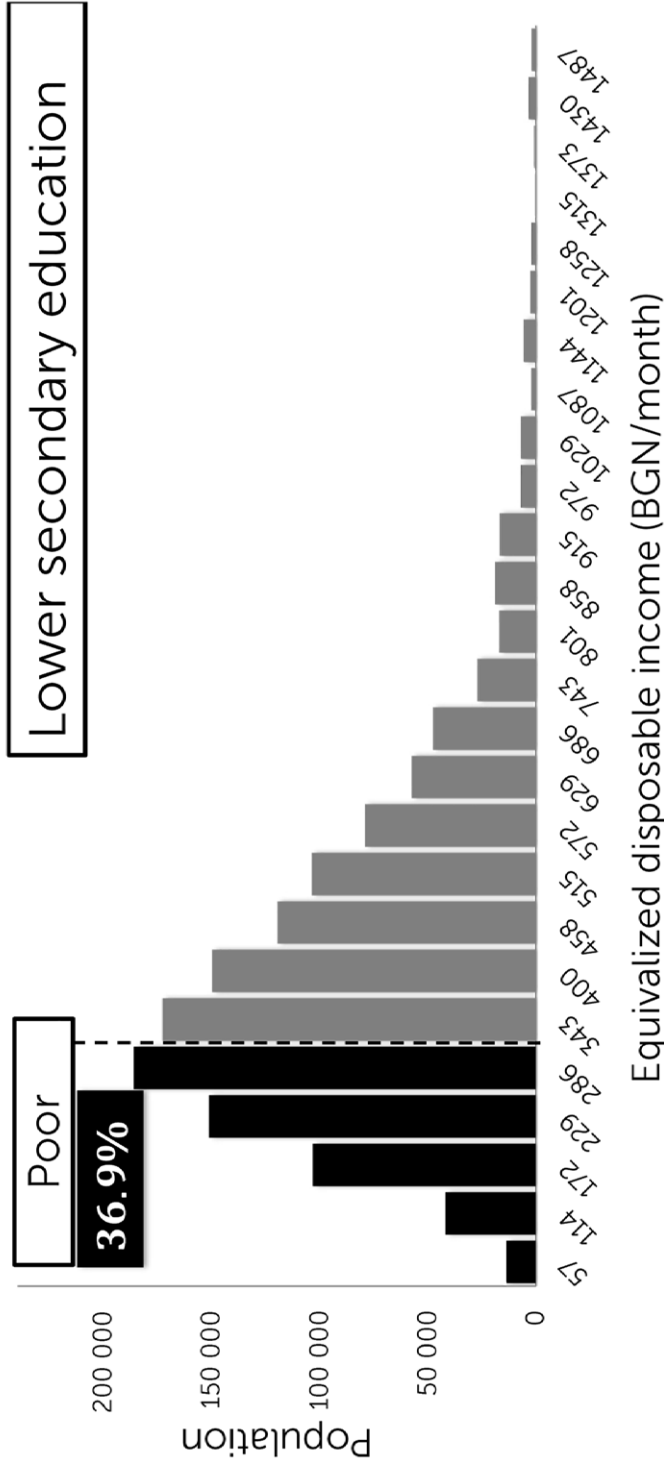
Source: National Statistical Institute (Bulgaria), IME

Figure 4: Income distribution curve – secondary education (Bulgaria 2013)

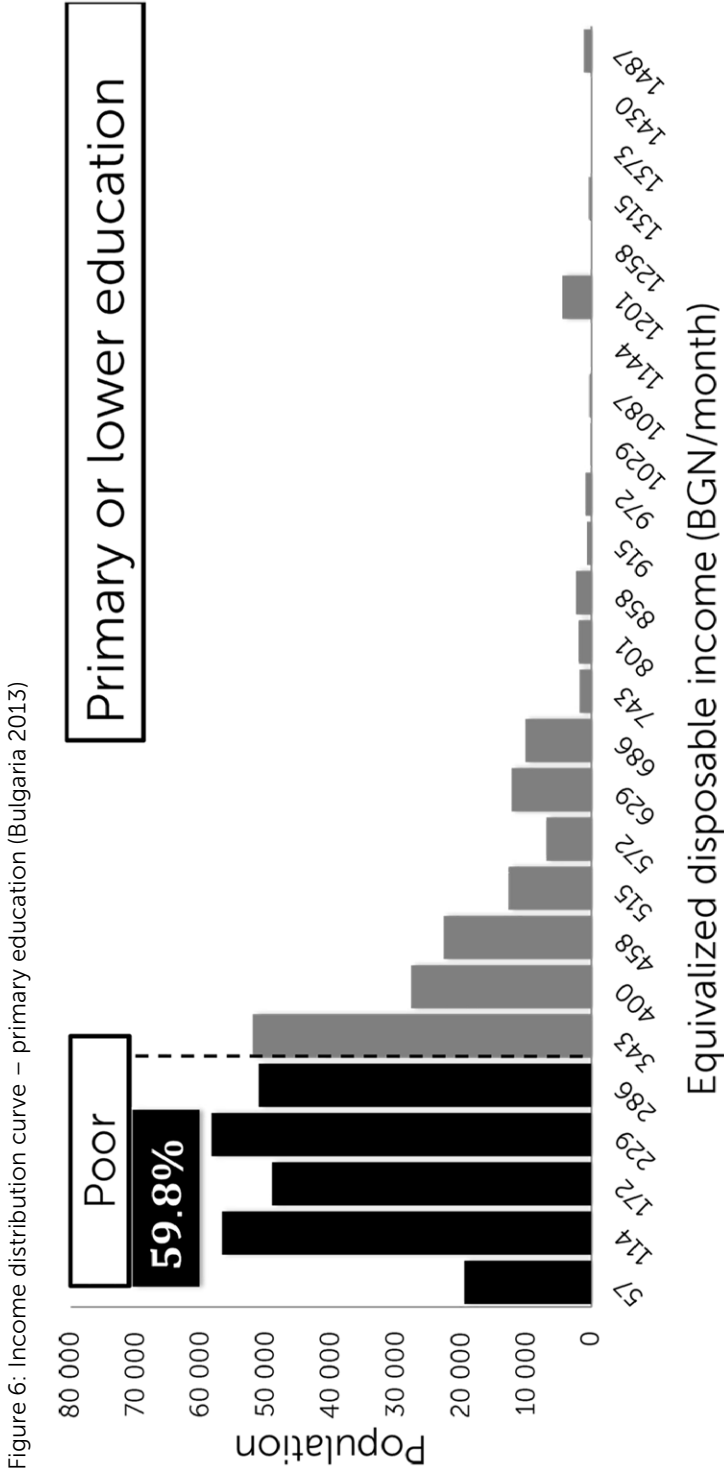


Source: National Statistical Institute (Bulgaria), IME

Figure 5: Income distribution curve - lower secondary education (Bulgaria 2013)



Source: National Statistical Institute (Bulgaria), IME



Source: National Statistical Institute (Bulgaria), IIME



FINISHING
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First, the group of those with just primary education shall be eliminated. There is a need for full coverage of basic education, meaning that all kids must reach at least 8th grade (or the respective level of knowledge). This is not just legally written in the Bulgarian Constitution³. The economic reality also shows that if you do not reach 8th grade, you will almost certainly face long-term unemployment and most probably be at risk of poverty. In other words, full coverage and no dropouts (from education, not strictly schools) at early stages of education are crucial.

Second, a deep reform in the elementary lower secondary education, or what is usually referred to as “ordinary schools”, is much needed. Here the system is failing: this group will always be big in numbers, but their economic performance in Bulgaria is very poor – two-thirds of them are not working. The main problem is that their skills are inadequate to the needs of the labor market. Finishing elementary school in 8th grade in Bulgaria must mean that a child has at least the basic knowledge and competences to adjust to modern economic life. Bulgarian educational system falls short in this regard.

Third, secondary education should be to a large extent interconnected with the labor market. This means that schools and businesses should be able to work together. While those who go to secondary education will most probably find job in Bulgaria, their income seems to be limited and they are vulnerable to economic fluctuations. In recent years (especially after 2015), the disconnect between secondary

³ “School attendance up to the age of 16 shall be compulsory”; Article 53 (2) of the Constitution of the Republic of Bulgaria. Available [online]: <http://www.parliament.bg/en/const>



AT PRESENT, WHILE MOST OF THE SCHOOLS IN BULGARIA ARE MUNICIPAL SCHOOLS, THEIR GENERAL FRAMEWORK AND FINANCING COMES FROM THE CENTRAL GOVERNMENT

schools and businesses is clearly visible, with around a third of the companies being unable to find a qualified workforce.

ADDRESSING THE CHALLENGES

If we look at the abovementioned goals, which are derived from the income data of households, we see that these issues go beyond purely educational policy. Those are challenges that occur chiefly in the sphere of family, local community, and business involvement. Let us therefore investigate the four main topics in Bulgarian schools that were touched upon by recent educational reform, but still pose some problems.

AUTONOMY

One of the main issues in Bulgarian education system is the autonomy of schools. Historically, the Bulgarian school has

a long tradition of being completely autonomous, backed up by local communities. This tradition was lost under communism. At present, while most of the schools in Bulgaria are municipal schools, their general framework and financing comes from the central government. Thus, it is still the case that the most important figure in Bulgarian schools is not the teacher nor the principal, but the respective minister in the cabinet.

However, during the last 10 years, some steps were taken in the direction of decentralization. After 2008, Bulgarian schools received their own budget (the “delegated budget”), which depended on the number of pupils in a given school. This was not only to introduce a clear rule of how the budget of a single school is to be formed, but also to shift power over the budget from the local authorities directly to school management. While schools still depend on the government to receive funding, they at least have control over these resources once they receive them. Since then the financial situation of Bulgarian schools has significantly improved. The budget of each school is no longer subject to short-term political decisions and depends on the (quantitative) performance of the school – number of pupils, dropout rates, etc.

In 2008, the system of “external evaluation” was also introduced. It evolved through the years and at present is giving quite a good overview of the quality of education in Bulgarian schools. While the results are in many cases troubling (hardly a surprise), the system allows us to differentiate among schools and see which ones are doing better and which are falling behind. It also gives an opportunity to further open the system where the focus will be on knowledge itself and not on the type of education, curriculum, or anything of this kind.

Since 2008 we could observe that there emerged some competition among schools and quite a few of them are open to some innovative ideas – especially private schools, which are still a minor share of the market. Nevertheless, the system is still rigid when it comes to textbooks and teaching methods. Moreover, the process of collective bargaining has completely dominated the employer-employee relation and leaves little room for management to differentiate in pay, reward success, or invest in young teachers, as well as to sanction the lack of results. Although Bulgarian schools have their own budgets and are going through external evaluation, these are just preconditions and not what real autonomy in education should look like.

FLEXIBILITY AND CHOICE

With the introduction of delegated budgets, schools in Bulgaria are predominantly financed on the basis of unified per student standards. In practice, this is supposed to lead to competition and effort (every school is expected to want to attract more students and have fewer dropouts), as well as to empower parents' choice – as a child can move to another school and the financing will go with him/her.

Although in some aspects this system is similar to the voucher system, it is not the same. If parents decide to move their child to a private school, the money will not follow – which means that financing is still targeted at funding public schools and not education itself.

The new education law foresees that private schools will also be part of that scheme, which means that Bulgaria is moving closer to the voucher system. Still, the financing reform will take effect in 2018 and there are some "social" obligations for the private schools to deliver if they want to participate in full. In any event, it is exactly the private schools that are most open to

introducing innovation and are on top of every external evaluation. Private schools are also in position to have a less rigid employer-employee relation, thus encouraging good teachers and punishing bad ones. That is because they do not face all the restrictions that public ones do. Still, at present, their effect is limited, as the financing model discourages such a choice. If, with the new almost-voucher system they can play a greater role, we may expect some positive impulses for the whole system.

INVOLVEMENT

There are quite a few examples from recent years which show how non-public actors (e.g., non-profit organizations and private individuals) can help schools. It seems it is not predominantly a question of financing, but more of citizens' energy and openness of the educational system for such solutions. A good example of this phenomenon are dropout cases that occurred in one of the poorest regions in Bulgaria.

Kozloduy is a small town located near the Danube river – part of the Vraca district, which is a region with rapidly deteriorating demographic conditions and few opportunities for young people. This is also a region with a troubling rate of school dropouts. What will be a usual sight is that sooner or later some of the pupils just stop showing up at school. This will be the children who are living not in the regional center, but somewhere in the periphery. What is even more troubling is that the parents of these students do not care enough about school and may even encourage a dropout – again, these are usually extremely poor families, with parents being uneducated and long-term unemployed.

We know from several sources⁴ that the schools will most probably not report the dropout immediately. Due to the delegated

⁴ See for example the investigation by NOVA

budget, they will prefer to keep the child on their list as that means they receive more money. Nevertheless, sooner or later the dropout will be reported to the regional inspectorate of education. Now, while some policies can be shaped to give incentives for a family not to encourage a dropout, the government officials will have limited chance of resolving the issue. They can use some form of the carrot-and-stick approach (exploiting some rules for receiving public allowances), but with almost no long-term effect.

What happens in some regions, and in Kozloduy, is that the inspectorate will pass the papers of the dropout to a special non-profit organization which deals with such cases. Such an NGO would then train volunteers from the region (some of them from local schools) who will visit the family of the dropout and talk to them repeatedly, explaining how *cool* it is to be back in school. And this works – not just in theory, but in practice – as in the case of some dropout kids from Kozloduy.

The take-away from this story is that a) such an issue is extremely time-consuming and it takes a lot of effort from the local community to solve it, and b) the system must be open to such a solution. If the school does not care or the inspectorate is closed for the non-governmental sector, none of this will actually take place. Being open to non-public-sector solutions should not be dependent on the openness of a particular public servant, but rather be rooted in the very heart of a policy.

PRACTICAL SKILLS

One of the other deeply rooted problems in Bulgarian education is the disconnection between education and businesses. In

2016, we hit record high levels of companies (one-third) that want to hire a specialist but are unable to find one. At present, Bulgaria is about to introduce a full vocational education system which gives some hope for change. The professional schools play an important role in Bulgaria, as they not only engage lots of children, but also these are usually the kids who are not from the city center (so mainly members of poor and middle-class families). Many troubled children, from families with serious economic difficulties, actually go to professional schools, which makes them extremely important from a social point of view.

While vocational education will create greater opportunities for these professional schools (at least because of the financial instruments available and the improved framework) some challenges remain. We still see local communities struggle to find the best form of coming together in planning what kind of classes will be needed in the coming years. There are plenty of examples of initiatives⁵ to open new or develop existing high-tech professional classes that fail because the locals did not succeed in finding children who would want to join them. Again, this is not a simple technical issue that just needs an adequate top-down solution. It is much more complicated than that, as regional demographics and challenges should also be considered.

Still, we see that those who are trying to bring together businesses and school management are performing better – even though in the end they sometimes fail. There are many instances when it is the schools that are not willing to cooperate. In Plovdiv (one of the best economic exam-

TV (4 January, 2017): <https://nova.bg/news/view/2017/01/04/169859/>

⁵ In the last three to five years, almost in every region in Bulgaria there was a case of closing a particular professional class due to lack of students.

ples in the country in the last few years as far as foreign investments are concerned), this was exactly the issue. Once again, the solution came from outside the system. The local community – businesses and experts – created what is now called an Education and Industry Board, which works for more adequate classes in local schools and pressures school management to be more open to new ideas. Other regions (like Gabrovo, which has an industrial profile) are thinking of replicating this initiative, together with the full introduction of the vocational education.

LIBERATING SCHOOLS

IME's poverty research clearly shows that education is the key to escaping poverty and creating a stronger middle class. While the Bulgarian schools were reformed in recent years, there are still many challenges that lay ahead. The autonomy of schools is still problematic. While they have their own budget, schools need to follow strict rules of how and what they teach, and the employer-employee relation is, in practice, socialistic due to the rigid collective bargaining in the system. Alternatives to the ordinary public schools (such as private schools or homeschooling) were largely neglected or forbidden until very recently. Vocational education is finally being introduced in full, but it is still dependent primarily on the good will of the school management.

All of the abovementioned good examples (like the smart homeschooler from Smolyan or the young volunteers from Vratsa, or the educational board in Plovdiv) were non-systematic solutions. They all fixed one or another *bug* in our educational system, but were not, strictly speaking, part of the system. Education in Bulgaria cannot be transformed by an act of a single institution or by a change in law alone. The solutions that are to be found depends on the



BULGARIA IS ABOUT TO INTRODUCE A FULL VOCATIONAL EDUCATION SYSTEM WHICH GIVES SOME HOPE FOR CHANGE

society at large and what the question is. The only question that remains is whether the schools will be open for them.

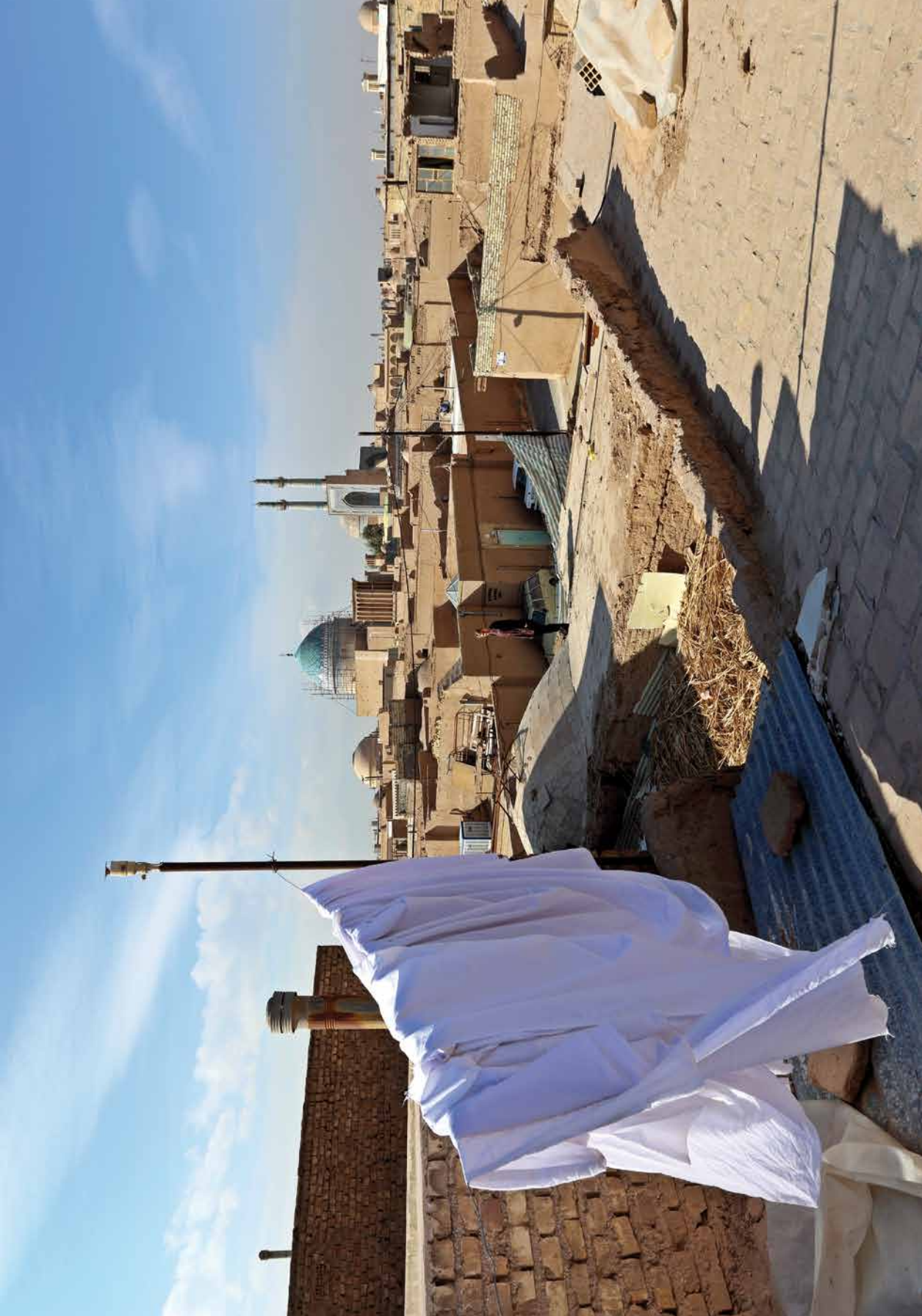
The idea of liberating schools goes beyond the classical "private versus public" debate. In the modern EU-type welfare state, it is hard to expect a full swing toward education privatization. But that alone is not an obstacle for opening up the system for all kinds of alternatives, introducing competition between public and private schools, and allowing for solutions such as homeschooling. It is also not an obstacle for opening up schools for local community and private investments. ●



PETAR
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Estonian
Education
System
1990-2016:
Reforms
and Impact



*
MIHKEL
LEES

The Estonian education system has a long history – its first academic schools were founded in 1630 (Tartu) and 1631 (Tallinn). In 1632, the first university, the University of Tartu, was founded. In the second half of the 17th century, the first Estonian folk-schools were opened. The aim of those schools was to provide education in the native language so that students could read the Bible. According to the census in 1897, the level of literacy in Estonia was 79.9 percent, the highest in the Russian Empire (56.3 percent in Moscow and 62.2 percent in Saint Petersburg). In 1920, six grades of education were made compulsory, which rose to eight grades in 1959-1963 and nine grades in 1968-1988. The Estonian education system maintained its peculiarity during the Soviet occupation – teaching was in Estonian, the atmosphere in schools derived from progressive ideas and democracy, textbooks were by Estonian authors, and teaching arts, music, and foreign languages were given a great emphasis.

EDUCATION SYSTEM TODAY

The governance of the education system is shared between central and local authorities, and schools have a high level of autonomy in resource allocation. The state sets national standards and establishes principles of education funding, supervision, and quality assessment. Early childhood education and care is managed by local authorities and most decisions in lower secondary education are made by the school. Most schools are public (96 percent compared to the OECD average of 81.7 percent). Higher education is divided between professional higher education institutions and universities. Both can give a doctoral degree and are accessible to graduates of general and vocational upper secondary schools. Estonia's expenditure on educa-

tional institutions as a percentage of GDP per student (for all education levels combined) is below the OECD average, with a higher share of public funding than the OECD average.

PUBLIC OPINION

The long history of folk-schools has shaped the opinion of public education as a great value. Also, the high level of sec-



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ondary education and parental expectations of their children reflect that. Ninety percent of 25- to 64-year-olds in Estonia have at least a secondary education (the OECD average is 75 percent). That is the highest result among the members of the European Union. Forty-five percent of 25- to 64-year-old women have a higher education degree (the OECD average is much lower – 34 percent). Secondary students' parents have more books at home and this contributes to general knowledge. In

Estonia, there are on average 176 books per home, compared to 154 books per home in Latvia and 120 books per home in Lithuania.

STRENGTHS OF THE ESTONIAN EDUCATION SYSTEM

Estonia is an overall high performer in PISA 2012, with policies that promote equality in the education system. Estonia achieved higher results in mathematics, reading, and science compared to other OECD countries. Results have improved in reading, but remained unchanged in mathematics and science, compared to previous PISA cycles. Moreover:

- **Estonia has the smallest number of low performers in Europe** and very few compared to the whole world;
- **The difference between rural and urban students' education levels is the world's smallest;**
- **Socio-economic background of students' parents has little influence on students' progress.** It means that children originating from underprivileged families can get high results in school;
- **Estonia has the fewest students without a basic education in the world.** Only 5 percent of all students do not achieve a basic education. In Iceland, there are 24 percent, in Switzerland 12.8 percent, and in Lithuania 16.2 percent;
- **Participation in early childhood education and care, which is mainly provided by public institutions, is higher than in other OECD countries.** While compulsory school attendance generally begins at the age of seven, almost all 4-year-olds (91 percent) and most 3-year-olds (87 percent) were enrolled in early

childhood education institutions in 2013 (well above the OECD average of 84 percent for 4-year-olds and 70 percent for 3-year-olds);

- **Grade repetition is among the lowest in OECD countries,** with only 3.5 percent of 15-year-old students repeating a grade at least once, compared to the OECD average of 12.4 percent in PISA 2012.

REFORMS IN THE EDUCATION SYSTEM IN 1990-2016

COMPULSORY EDUCATION

AND UPPER-SECONDARY EDUCATION

Basic education (grades 1-9) is compulsory in Estonia. It starts with the first full school year after children have reached the age of seven and continues until students have satisfactorily completed basic education or have reached the age of 17. The system does not differentiate between primary and lower secondary education – basic school is treated as one stage. After completing the basic school satisfactorily, students can continue their education in upper secondary education schools (grades 10-12) or vocational education institutions free of charge.

DEVELOPMENT OF THE NATIONAL EDUCATION SYSTEM

The main aims of education reform in the 1990s were to “de-ideologize” education and set the foundations for the national education system. The process included writing new curricula, textbooks, and other curricular materials, as well as re-training teachers.

One of the aspects that gave the Estonian education system a good starting point in the 1990s, when independence was regained, was that Estonia had permission to deviate from Soviet Union requirements in the 1960s and 1970s (e.g., an 11 year sec-

ondary education in contrast to the official 10 year education, permission to have Estonian authors write some textbooks, use of different curricula).

In the late 1980s and early 1990s, most education institutions relating to Soviet times were closed or rearranged and new institutions were established. In this process, the Open Estonia Foundation (OEF) played the key role. In 1994, OEF supported a series of seminars entitled "Independent School" dealing with school development, management, policies, testing, and legislation. A year later, OEF launched a series of seminars for school leaders. This initiative developed into a network of "Schools of Distinction" which became the ground for multiple initiatives in curriculum development, school renewal, and improvement of school management. In 1998, OEF supported the launch of the project "Quality Management System in Estonian Schools". The aim of the project was to develop quality system modules and put them into practice.

The legal framework of the Estonian education system was laid by several laws adopted in the 1990s. The most important laws and legislative acts for the primary, basic, and secondary education were:

- **The Law on Education of the Estonian Republic** (1992) – general principles;
- **The Law on Basic and Upper Secondary Schools** (1993) – conditions for establishing, operating, and closing state and municipal primary and basic schools and gymnasia; principles for governing basic and general secondary education;
- **The National Curriculum** (1996) – basic principles of schooling, framework for all teaching organizations regardless of the language. Schools develop their individual

curricula based on the national curriculum. National curriculum provides a list of compulsory subjects with a syllabus (list of subject content) and study time (number of lessons) for each subject;

- **The Law on Private Schools** (1998) – conditions for establishing and operating schools that are owned by private individuals or legal entities.

The new legal environment was different from the Soviet Union's. The cornerstone of the legislation was the requirement to provide education to all children living in Estonia according to their abilities, including children with special needs. While in the Soviet Union, there was an understanding that certain disabled children should not be educated, in Estonian legislation the education of children with disabilities is supported. Expenses of the teaching staff, school principals, their deputies, and school textbooks (regardless of school ownership throughout secondary education and in accordance with the number of students) are financed by the state through the budget of the Ministry of Education. All other expenses are borne by the authority responsible for the school (central government, municipality, or private entity).

In the first half of the 1990s, the focus was on the search for leadership at all levels. Teacher training changed based on Western examples (concerning structure and content).

In the mid-1990s, Estonia started to develop central quality assurance mechanisms – centrally administered assessments and examinations. The development resulted in an elaborate system of externally set and/or administered tests, including national assessments for grades 3 and 6, as well as national tests for grade 9 and exams for grade 12. The grade 12 exams



IN 2011,
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SEPARATED INTO
TWO FRAMEWORKS:
ONE FOR LOWER
SECONDARY
AND ONE
FOR UPPER
SECONDARY
SCHOOLS

have school graduating and university-admitting functions at the same time. It was a time when the philosophical foundation of education and national strategy was discussed in informal and state-wide groups. Different projects to establish intellectual foundations for reform and prepare school leaders, teachers, and others were initiated.

New strategies were carried out in the late 1990s. The legal framework of the education system was updated. In 1997, the development of “Estonian Scenarios 2010” started, which later led to “Estonian Education Scenarios 2015”. Wider consensus was found with the scenario called “Learning Estonia” that was also presented in the Parliament.

During the 1990s decentralization of the Estonian school network, local municipalities gained more responsibility to plan and maintain the quality of education. Estonian headmasters have autonomy when choosing school personnel and controlling the school budget. Estonian teachers have autonomy when choosing study materials and during the evaluation process. Research indicates that decentralized education systems provide more equal opportunities for students to gain a high-quality education.

The new national curriculum, accepted by Parliament in 1996, focused on school outputs. It described competencies, or standards, to be achieved at the end of each school stage and provided guidance about how to organize a student-centered learning process in school. In 2011, the national curriculum was separated into two frameworks: one for lower secondary and one for upper secondary schools. Each framework enabled schools to develop their own curricula while taking students’ interests and cultural differences into account.

New amendments came into force under the Basic Schools and Upper Secondary Schools Act. Those amendments mainly aim to clarify the rights and duties of all involved parties (parents, schools, local government) and set bases for management and funding of schools, as well as for state supervision of teaching and school activities.

They also aim to enforce compulsory school attendance and reduce early school leaving. For example, they mandate a regular update of databases to help detect children with school attendance problems. Additionally, among the objectives of these amendments is improving availability of support services in schools such as career counselling and guidance, social pedagogy, psychology, and speech therapy. Starting in 2014, the provision of those services has been organized through the regional centers of Pathfinder (Rajaleidja).

In February 2014, the government adopted the Estonian Lifelong Learning Strategy 2020. This document guides the most important developments in education and is the basis for the government decisions for educational funding for 2014-2020.

The general goal of the Lifelong Learning Strategy is to provide all people in Estonia with learning opportunities throughout their lifespan. Opportunities are tailored to their needs and capabilities in order to maximize dignified self-actualization within society, work, and family life.

Five strategic goals have been established:

- **Change in the approach to learning.** Implementation of an approach to learning that supports each learner's individual and social development, the acquisition

of learning skills, creativity, and entrepreneurship at all levels and in all types of education.

- **Competent and motivated teachers and school leadership.** The assessment of teachers and headmasters, including assessment of salaries' consistency to qualification requirements and work-related performance.

- **Concordance of lifelong learning opportunities with the needs of labor market.** Lifelong learning opportunities and career services that are diverse, flexible, and of good quality should result in an increasing number of people with professional or vocational qualifications and increasing overall participation in lifelong learning across Estonia.

- **A digital focus in lifelong learning.** Modern digital technology is used for effective learning and teaching. An improvement in the IT skills of people has been achieved and access to the new generation of digital infrastructure is ensured.

- **Equal opportunities and increased participation in lifelong learning.** Created for every individual.

EDUCATIONAL AND SOCIAL FACTORS THAT DECREASE SOCIAL AND ECONOMIC INEQUALITY

There are many methods that help decrease social and economic inequality in the educational field. Already before the restoration of independence, students were granted psychological help and speech therapy. Moreover, private consultations were offered to students who had trouble with learning.

Since 2006, every Estonian basic school student gets a free school lunch. Many local municipalities offer "morning porridge" to those who are in need. Since 2014, every upper-secondary student gets a free school lunch.

Many local municipalities also offer “financial school support” to the families who need it (for textbooks and other school supplies). Free healthcare is secured for every Estonian student.

FUNDING

Schooling is free in Estonia for all students according to their needs. Between 2005 and 2012, the annual expenditure per student increased by 30 percent.

The government changed its school funding model from “per capita” to “per class” criteria in 2008, allowing more equal distribution of funds to rural schools.

ICT DEVELOPMENT – THE TIGER LEAP

The initiative began in the 1990s with the commitment to ensure that all students had access to computers. Today, it has evolved into a broader aim to ensure competitiveness in the global information economy.

In the early 1990s, the Information Communication Technology infrastructure in education was outdated and inadequate compared to Western countries, and users had little experience. Nevertheless, the academic computer knowledge was relatively high and there was a remarkable level of interest and readiness among wider society.

Table 1: Average monthly gross salary of teachers 2005-2016 (EUR)

Year	Average monthly gross salary of municipal school teachers	Average monthly gross salary of state school teachers	Average monthly gross wages and salaries in Estonia	Minimum salary rate of teachers
2005	555	501	516	365
2006	593	604	601	447
2007	719	682	725	528
2008	850	817	825	644
2009	810	837	784	670
2010	783	838	792	644
2011	797	861	839	644
2012	812	876	887	655
2013	930	941	949	715
2014	1025	1028	1005	800
2015	1135	1168	1065	900



IN 1997,
THE MINISTRY
OF EDUCATION,
COMPUTER
COMPANIES,
AND PRIVATE PERSONS
ESTABLISHED
THE TIGER LEAP
FOUNDATION

The first school computer program was implemented in 1987–1992, when approximately 3,000 computers were sent to schools. All basic schools received one or two computer stations and all high schools had one classroom with computers made in Estonia. Unfortunately, there were several difficulties – computers were unreliable, many of them broke down and were neglected. It was also hard to find teachers because the subject did not exist in official curricula.

In 1992–1996, the state invested about EUR 189,000 annually into schools' IT equipment. About 40 Estonian schools managed to properly equip computer classrooms. Also, developing suitable software for the Estonian study programs started.

The Tiger Leap National Programs were launched in 1996 by President Lennart Meri. It was the start of modernization of the Estonian education system. The new national curriculum for basic and secondary schools was adopted in September

1996. In 1997, the Ministry of Education, computer companies, and private persons established the Tiger Leap Foundation.

Goals of the program were to provide Estonian teachers with elementary computer skills; to develop the curriculum and learning environment; to connect the Estonian education system with international information databases; to encourage the creation of original software for the Estonian language, culture, history, and environment; to develop information systems for education; and to establish regional computer skills teaching centers.

In 1996–1998, the availability of hardware throughout Estonia improved significantly (from 50 students per computer to 20 students per computer) and the use of computers and internet in school programs increased. The Tiger Leap program also improved cooperation between the state, schools, and service providers.

TEACHERS

Teachers have very high qualification standards in Estonia – they need to have a master's degree and a teaching profession. During the last decade, Estonia has strived to increase teacher salaries [See Table 1].

Although it is not comparable to richer OECD countries, the increase in salary has been one of the quickest during the last decade. Although salaries of teachers have risen, current levels are considered insufficient to make the teaching profession attractive. Additional funds have been allocated from the state budget to continue the increase.

To encourage newly qualified teachers to work in small towns and rural areas and teachers fluent in Estonian to teach in schools where Russian is the main language, they are offered an allowance of

more than EUR 12,750 during the first three years of teaching with the obligation to work there for at least five years.

Higher education institutions providing teacher training have formulated common competency standards for teachers and articulated a development plan for the teacher-training system.

In 2013, new professional standards for teachers were set to develop continuous teacher training and to assess future teachers' readiness to enter the profession. Organizing the continuous training is based on the concept of continuous education of teachers and heads of school, implemented by the Ministry of Education and Research in cooperation with its partners.

EDUCATION IN RUSSIAN LANGUAGE

Almost one-third of the Estonian population is formed by the ethnic Russian community. In 1997, the Ministry of Education initiated the development plan for Russian-speaking schools as a part of the 1997-2007 Activity Plan for a unified Estonian education system. In 1998, the government approved the plan and Russian-speaking schools started their transition toward Estonian curricula.

Over two decades, the support for language studies of children with Estonian as a second language and support for studying in Estonian in general have been prioritized. Both policy formulation and parliamentary support have aimed to enforce this goal.

In 1993, a Primary and Secondary Education Act was passed that set Estonian as the official studying language, but as a result of public discussion, Russian was also allowed in middle schools. In November 2007, the government ap-

proved a step-by-step plan to fully implement Estonian as the educational language. According to the plan, by 2011, all schools should have at least 60 percent of subjects taught in Estonian. Since 2009, it is also obligatory to teach Estonian in all non-Estonian pre-schools and kindergartens to children ages 4 and above. The state has allocated money for salaries of Estonian teachers in pre-schools and kindergartens, supported teachers training, and issued study materials.



SIMILAR TO BASIC AND SECONDARY EDUCATION, HIGHER EDUCATION HAS ALSO UNDERGONE FUNDAMENTAL CHANGES SINCE ESTONIA REGAINED INDEPENDENCE

Although the 1993 law does not make it compulsory to teach Estonian in middle schools, the majority of schools teach some subjects in Estonian. The state has also supported local municipalities to make the Estonian study environment more effective. Since 2014, Russian-

speaking schools also started to shift toward Estonian-based vocational education.

INTERNATIONAL CURRICULA

The possibilities to acquire general education in different languages contribute to the rotation of foreign and Estonian diplomats and foreign experts to come and work in Estonia.

According to the Basic Schools and Upper Secondary Schools Act, it is possible to conduct studies in Estonia with curricula formulated under the aegis of either the International Baccalaureate Organization or the Statute of the European Schools. Those curricula are designed foremost for the children of foreign officials and specialists working in Estonia.

HIGHER EDUCATION

There are different academic and non-academic options to acquire higher education in Estonia. Non-academic higher education can be obtained via secondary education based on professional higher education programs that last three to four years. Part of the programs is always the practical training.

Academic higher education is divided into three levels: bachelor's, master's, and doctorate. In 1991-1994, the first level lasted for five years and, after that, a bachelor's degree was received. In 1995, the system changed and four-year bachelor's programs were introduced. Since 2002, the nominal time for a bachelor's degree is three to four years (depending on the duration of a master's). A secondary school diploma and a certificate of national examinations is needed for admission to the higher education institution. Other and more specific requirements depend on the institution and area of specialization.



LARGE-SCALE
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ALREADY
IN THE BEGINNING
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BY REMOVING
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FROM PROGRAMS,
INCREASING
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AUTONOMY,
INTRODUCING
THE CREDIT
ACCUMULATION
SYSTEM BASED
ON STUDENT
WORKLOAD,
AND AN
ACCREDITATION
SYSTEM



AT THE BEGINNING OF THE 1990s, THE ECONOMIC SITUATION IN ESTONIA CHANGED DRASTICALLY: THE SOVIET STATE-CONTROLLED SYSTEM WAS REPLACED BY THE MARKET-BASED SYSTEM

Similar to basic and secondary education, higher education has also undergone fundamental changes since Estonia regained independence. The changes have been made in almost every field of higher education – from curricula to funding and structure.

In the 1990s, the legal framework for the higher education system was established. It contained several laws and legislative documents:

- **Law on Universities** (1995);
- **The Standard of Higher Education** (1996) – requirements for higher education, licenses, and accreditation;
- **Law on the Organization of Research and Developmental Activity** (1997);

- **Law on Applied Higher Education Institutions** (1998).

Other main documents shaping the higher education policy in Estonia include:

- **Higher Education Strategy 2006-2015** (2006) – approved by the Parliament;
- **Higher Education Internationalization Strategy** for 2015 (2007);
- **OECD recommendations** - “Thematic Review of Tertiary Education” (2007);
- **Estonian Life Learning Strategy** 2020.

The early and mid-1990s are characterized by the demolition of the old and building up the new legal environment. It can also be seen as a period of shock and survival. The second half of the decade saw the expansion of the higher education system in combination with the development of legal frameworks and quality assurance mechanisms for different sectors. It was the period of “step by step” improvement.

The beginning of the millennium had new reforms, hallmarked by the higher education reform plan in 2001. It was a recovery period. The last decade is best characterized by the performance-based model in Estonian higher education.

BOLOGNA PROCESS IN ESTONIA

Estonia was among the countries who signed the Bologna Declaration in 1999. Large-scale changes started already in the beginning of 1990s by removing Soviet ideology from programs, increasing university autonomy, introducing the credit accumulation system based on student workload, and an accreditation system.



SINCE 2009, ACCREDITATION OF A HIGHER EDUCATION INSTITUTION IS MANDATORY AND IS CONDUCTED FOR SEVEN YEARS

The Bologna process was seen as a continuation of those developments, an opportunity to increase the competitiveness internationally (comparable degree structure) and broaden the student choice (national and international mobility). In 2001, the government approved the reform plan. Major legislative changes were implemented in 2002 and 2003. Transition to the new degree system was quick due to institutional interest in the changes. Legalizing the basis for recognition of foreign qualifications started in 2005.

INSTITUTIONS PROVIDING HIGHER EDUCATION

At the beginning of the 1990s, the economic situation in Estonia changed drastically: The Soviet state-controlled system was replaced by the market-based system. It also meant that private institutions entered higher education. Most of the higher education institutions were small, with the enrollment below 1,000 students. The main focus was on teaching and research came second. The establishment of the Estonian Science

Foundation in 1990 and the research audit by the Academy of Sweden in 1992 led to the rise of stronger research institutions and universities and the closure of weaker ones.

As a result of the liberal policy of the 1990s, the higher education system became too fragmented: in 2005, there were 44 higher education institutions in Estonia. By 2016, the number has decreased to 21:

- six state universities,
- one private university,
- eight state professional higher education institutions,
- six private professional higher education institutions.

The external accreditation of the study programs started in 1997 when the Higher Education Accreditation Centre was established. A positive accreditation decision on a study program was mandatory for the higher education institution to issue nationally recognized graduation documents. Accreditation committees were comprised of experienced foreign experts. The full accreditation was given for seven years, conditional accreditation for three years, and the decision of negative accreditation resulted in the closure of the study program. Institutional accreditation was voluntary during that period. A total of more than 1,400 study programs and six institutions were accredited during 1997–2009. Since 2009, accreditation of a higher education institution is mandatory and is conducted for seven years. Study programs are assessed in a specific study program group and in a specific academic field (e.g., professional higher education, bachelor studies, master's studies, doctoral studies).

ENROLLMENT IN HIGHER EDUCATION

In the school year of 1993–1994, there were about 25,000 students in Estonian higher education. The number increased year by year and reached its peak in 2005–2006, when there were about 68,000 students. During the last decade, the number has decreased and, in the last school year (2015–2016), there were about 51,000 students enrolled. The decrease was caused by the demographic situation as Estonia has fewer young people.

2012 HIGHER EDUCATION REFORM

In 2007, an OECD analysis concluded that the Estonian higher education funding system did not match the needs of labor market. The market needed more specialists in some fields than universities could provide (e.g., teachers and engineers). The other problem was that the system distorted the free choice of students. About 50 percent of students paid tuition fees. The number of free study positions in some fields drew the talented students to study in fields they did not like because it enabled them to study for free. The system was inefficient – the completion rate in some fields was below 30 percent. The responsibilities of the state and universities were unclear.

In 2008, the University Act was modified. The funding system was changed to be more goal-oriented (activity support). In March 2011, at national elections, one of the main topics was the higher education system. After the elections, the first drafts were worked out and presented in the Parliament. The new University Act was adopted in 2012. Quality became the overarching goal in the higher education system. The aim of that reform was also to increase the fairness of the system, the efficiency of studies, and to reduce the gap between the various fields of higher education.

From 2013, all full-time students do not have to pay tuition fees. The number of study positions is determined by a university's teaching capacity and performance agreement. New types of activity contracts were introduced and the additional funding depended on the new contract. Performance contracts made possible open discussions about quality issues, cooperation, and focus areas of universities, and set the goal for improvement.

In 2013–2014, need-based study allowances were introduced. The aim of new measures was to support higher education studies of students with economic difficulties. In 2014, new types of scholarships were added to motivate students to work in STEM (science, technology, engineering, and math) fields.

FUNDING

In 1995–2012, higher education institutions were funded from the state budget for the provision of graduates (i.e., state-commissioned study positions, about 80 percent of the funding), in capital investment, and other expenditures (such as library costs). The cost of study positions varied across fields (different funding coefficients). In 2010–2011, 51 percent of study positions were state-commissioned (free).

In 2013, higher education reform in Estonia came into force and the higher education funding principles were changed. An input-oriented funding formula was replaced by a performance agreement-based funding model.

Seventy to 75 percent of the activity support for higher education institutions is based on activities connected to the extent, quality, and efficiency of the provision of instruction according to the following indicators:

- **Indicators for extent:** the number of students admitted; the number of students studying in educational institutions in foreign countries; the number of foreign students studying in the university; the number of external teaching staff employed as regular staff; and the number of full-time students as the extent of provision of instruction;
- **Indicators for quality:** goals reached that were established in the previous performance agreements; results of matriculated students; continuation of studies at the next academic level; and the employment of graduates as the quality of provision of instruction;
- **Indicators for efficiency:** the number of graduates from the university and the number of graduates in broad groups of studies of national importance as the efficiency of provision of instruction.

Twenty-five to 30 percent of the activity support is for the provision of instruction of national importance (e.g., professorships of national importance, targeted funding for certain colleges, or university libraries).

From January 1, 2017, Estonia plans to correct the funding model because the existing model can induce sudden unreasonable fluctuations in funding. Higher education institution funds in the budget will be distributed for activity support for higher education institutions and targeted funding.

Activity support will consist of baseline funding (at least 80 percent) based on the average activity support received during the last three years;

- performance funding based on performance indicators (up to 17 percent);

- performance funding based on performance agreement (up to 3 percent).

Objectives are negotiated and agreed to (also for targeted funding) in three-year performance agreements.

FUTURE CHALLENGES

Even with the relative success of the Estonian education system, there remains a number of challenges that will need to be addressed:

1. **Aging staff causes the need to make teaching a more attractive profession for youth to avoid a shortage of qualified teachers.**

There are 14,329 teachers in Estonia who are an average of 47.4 years old. Only 9 percent of teachers are younger than 30; the goal for 2020 is 12.5 percent. The proportion of female teachers is 86 percent; the goal for 2020 is 75 percent.

Possible solutions:

- Higher salary. The goal for 2019 is for teacher salaries to be 120 percent of the Estonian average.
- More rights for teachers.

2. **Further incorporation of IT into the learning process.**

The importance of information technology has considerably increased in daily life. Improved availability of internet via various digital devices and data communications packages has provided access to a huge amount of information and numerous possibilities. Better skills to use technology and innovations would support the increase in productivity in economy.

Possible solutions:

- Better integration of IT into curricula.

- Encouraging teachers to use IT in teaching.
- Implementing e-assessment methodology and tools.
- Supporting digital learning resources in schools.
- Producing interoperable software solutions, commercial and non-commercial study materials.
- Increasing the use of personal digital devices for studying.

3. **Estonian education system needs to adapt to decreasing number of school-aged children.**

Due to demographic changes, the number of students has decreased about 40 per cent in the last 15 years. Estonia is currently reviewing its school system to maintain basic schools that are close to students' homes while ensuring the quality and diversity of upper-secondary education study choices in county centers.

Possible solutions:

School Network Program 2015–2020 (EUR 241 million investments):

- The responsibility for basic education resides with local governments and responsibility for secondary education with the state.
- Establishment of state-run secondary schools in county centers (at least 15 schools).
- Optimizing and updating the basic school network.
- Reorganizing the school network for students with special educational needs (reducing the number of schools by one-third).

- Ensuring adequate conditions in basic schools to integrate students with less-serious special needs.

CONCLUSIONS

There is a long history of schooling in Estonia and education as such is highly valued. Social and education systems help students from different socio-economic backgrounds get an equally good education. Teachers have very high qualification standards and the school system is decentralized, whereas tasks are clearly separated between local and state governments. As an IT country, Estonia is working on better integration of IT into its curricula. The future challenges are related to changes in demography, in school networks, and in making teaching a more attractive profession. Those, however, can be tackled by applying the abovementioned solutions. ●



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MIHKEL
LEES

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Increasing Children's Physical Activity in Estonia



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MIHKEL
LEES

The deficiency of physical activity among children has become a problem across Europe, including Estonia. One of the driving forces may be that children spend more time using smartphones and tablets instead of playing with friends and doing sports. According to the latest research by Aasvee & Minossenko¹, less than 20 percent of Estonian children move as much as the World Health Organization advises, which is at least one hour a day². A major challenge is to find ways to increase children's physical activity.

During the last few years, there have been several surveys about the physical activity in Estonia. In the Aasvee & Minossenko study, 16.4 percent of Estonians 11 to 15 years old declared that they are engaged in some kind of physical activity at least one hour a day every day. In general, boys were more active than girls. However, when researchers measured the activity level with activity monitors instead of asking students, the results showed that the advised activity level is reached by 13 percent of girls between 2 and 11 years old and 26.8 percent of boys³. Additionally, only 18.3 percent of children between 7 and 13 years old move enough every school day⁴. It is therefore evident that most children do not have enough physical activity.

¹ Aasvee, K. and Minossenko, A. (2011) *Eesti kooliõpilaste tervisekäitumise uuring 2009/2010 õppeaasta*. Tallinn: Tervise Arengu Instituut.

² World Health Organization (2010) *Global recommendations on physical activity for health*. Geneva: World Health Organization.

³ Konstabel, K., Veidebaum, T., Verbestel, V., Moreno, L. A., Bammann, K., Tornaritis, M. and Pitsiladis, Y. (2014) "Objectively measured physical activity in European children: the IDEFICS study", [in:] *International Journal of Obesity*, 38, pp. 135–143.

⁴ Laste liikumisuuring (2015) "Uuringu andmebaas", [in:] *Tartu Ülikooli kehakultuuriteaduskond*.



THE PHYSICAL CAPABILITY DEVELOPED BY PHYSICAL ACTIVITY IS CONNECTED WITH MANY HEALTH BENEFITS FOR SCHOOL-AGED CHILDREN AND YOUTH AND IS ONE OF THE MOST IMPORTANT HEALTH INDICATORS

To address the problem, many countries have developed school-based measures to increase physical activity. The most effective measures have been multi-component school-based interventions⁵.

THE IMPORTANCE OF PHYSICAL ACTIVITY IN CHILDHOOD

Research shows that physical activity plays an important role for physical and mental health – it supports and even improves the

⁵ Kriemler, S., Meyer, U., Martin, E., van Sluijs, E.M.F., Andersen, L.B. and Martin, B.W. (2011) "Effect of school-based interventions on physical activity and fitness in children and adolescents: A review of reviews and systematic update", [in:] *British Journal of Sports Medicine*, 45(11), pp. 923–930.

quality of life⁶. The right dose of activity has a considerable influence on diminishing the risk of cardio-vascular diseases, diabetes, hypertension, several forms of cancer, and obesity⁷. It also helps decrease the risk of mental health problems⁸. The physical capability developed by physical activity is connected with many health benefits for school-aged children and youth⁹ and is one of the most important health indicators¹⁰. Regular physical activity keeps the skeleton and muscles fit and healthy, increases muscular power and endurance, and decreases the risk of chronic diseases.

⁶ Brown, H. E., Pearson, N., Braithwaite, R. E., Brown, W. J. and Biddle, S. J. (2013) "Physical activity interventions and depression in children and adolescents", [in:] *Sports medicine*, 43(3), pp. 195–206;

Dishman, R. K., Hales, D. P., Pfeiffer, K. A., Felton, G. A., Saunders, R., Ward, D. S. and Pate, R. R. (2006) "Physical self-concept and self-esteem mediate cross-sectional relations of physical activity and sport participation with depression symptoms among adolescent girls", [in:] *Health Psychology*, 25(3), pp. 396–407.

Janssen, I. and Leblanc, A. G. (2010) "Systematic review of the health benefits of physical activity and fitness in school-aged children and youth", [in:] *International Journal of Behavioral Nutrition and Physical Activity*, 7(40), pp. 1–16.

⁷ Buffart, L. M., Singh, A. S., van Loon, E. C., Vermeulen, H. I., Brug, J. and Chinapaw, M. J. (2014) "Physical activity and the risk of developing lung cancer among smokers: A meta-analysis", [in:] *Journal of Science and Medicine in Sport*, 17(1), pp. 67–71; Schranz, N., Tomkinson, G., Parletta, N., Petkov, J. and Olds, T. (2014) "Can resistance training change the strength, body composition and self-concept of overweight and obese adolescent males? A randomized controlled trial", [in:] *British journal of sports medicine*, 48(20), pp. 1482–1488.

⁸ Hassmen, P., Koivula, N. and Uutela, A. (2000) "Physical exercise and psychological well-being: a population study in Finland", [in:] *Preventive medicine*, 30(1), pp. 17–25; Penedo, F. J. and Dahn, J. R. (2005) "Exercise and well-being: a review of mental and physical health benefits associated with physical activity", [in:] *Current opinion in psychiatry*, 18(2), pp. 189–193.

⁹ Janssen, I., and Leblanc, A. G. (2010) "Systematic review of the health benefits of physical activity and fitness in school-aged children and youth", [in:] *International Journal of Behavioral Nutrition and Physical Activity*, 7(40), pp. 1–16.

¹⁰ Ortega, F. B., Ruiz, J. R., Castillo, M. J., and Sjostrom, M. (2008) "Physical fitness in childhood and adolescence: a powerful marker of health", [in:] *International Journal of Obesity (London)*, 32(1), pp. 1–11.



INTEGRATING SMALL BREAKS FOR PHYSICAL ACTIVITIES DURING THE SCHOOL LESSONS IMPROVED CHILDREN'S PERFORMANCE IN STANDARDIZED ACADEMIC TESTS

More than that, physical activity may increase self-confidence and reduce stress and anxiety levels¹¹.

Athletics also play a crucial role in physical development and prevention of cardiovascular diseases¹² – for example, according to a 2004 survey examining the descriptive statistics of about 155 children between ages 3 and 7, girls with lower level of physical activity had a higher body-mass index than their more active contemporaries¹³.

¹¹ Physical Activity Guidelines Advisory Committee (2008) "Physical activity guidelines advisory committee report, 2008". Washington, DC: US Department of Health and Human Services, pp. A1–H14.

¹² Jiménez-Pavón, D., Kelly, J. and Reilly, J. J. (2010) "Associations between objectively measured habitual physical activity and adiposity in children and adolescents: Systematic review", [in:] *International Journal of Pediatric Obesity*, 5(1), pp. 3–18; Timmons, B.W., Naylor, P.J. and Pfeiffer, K.A. (2007) "Physical activity for preschool children: How much and how?", [in:] *Can. J. Public Health*, 98(2), pp. 122–134.

¹³ Sääkslahti, A., Numminen, P., Varstala, V., Helenius, H., Tammi, A., Viikari, J. and Välimäki, I. (2004) "Physical ac-

More active children also had lower levels of bad cholesterol. The data was gathered by the annual doctor visit summaries and physical activity diaries that children kept.

Moreover, physical activity has a strong connection with the functioning of the central nervous system – cognitive and motor abilities develop in accordance¹⁴. It helps, for instance, to supply the brain with oxygen and nutrition, increases the growth of nerve cells in the hippocampus (the center of learning and memory), and contributes to the development of nerve connection. These physical processes have a positive effect on increasing the ability of attention and the capacity of processing information and memory¹⁵.

In 2011, Donnelly and Lambourne wrote an article in which they brought out the connections among physical activity during the school day, their body-mass index, and academic achievement¹⁶. They found that integrating small breaks for physical activities during the school lessons improved children's performance in standardized academic tests. The same discovery was made in a 2007 Illinois survey based on the data of 259 pupils from grades 3 and 5¹⁷: the pupils' aerobic capability proved to

tivity as a preventive measure for coronary heart disease risk factors in early childhood", [in:] *Scandinavian journal of medicine & science in sports*, 14(3), pp. 143–149.

¹⁴ Diamond, A. (2000) "Close interrelation of motor development and cognitive development and of the cerebellum and prefrontal cortex", [in:] *Child development* 71(1), pp. 44–56.

¹⁵ Rosenbaum, D. A., Carlson, R. A. and Gilmore, R. O. (2001) "Acquisition of intellectual and perceptual-motor skills", [in:] *Annual review of psychology*, 52(1), pp. 453–470. Trudeau, F. and Shephard, R. J. (2008) "Physical education, school physical activity, school sports and academic performance", [in:] *International Journal of Behavioral Nutrition and Physical Activity*, 5(1), p. 10.

¹⁶ Donnelly, J. E. and Lambourne, K. (2011) "Classroom-based physical activity, cognition, and academic achievement", [in:] *Preventive medicine*, 52, pp. 36–42.

¹⁷ Castelli, D. M., Hillman, C. H., Buck, S. M. and Erwin,



SEVERAL OTHER COUNTRIES IN EUROPE AND ELSEWHERE (E.G., CANADA, FINLAND, ESTONIA) HAVE ALREADY STARTED TO DEVELOP DIFFERENT SCHOOL-BASED MEASURES TO INCREASE PHYSICAL ACTIVITY

be in accordance with their mathematical and linguistic capabilities. In conclusion, the role of physical activity to the cognitive functions and ability to learn should not be underestimated.

INCREASING PHYSICAL ACTIVITY DURING SCHOOL-DAY

Taking into account the low physical activity level among Estonian pupils and the results of the previously mentioned surveys, we may say that increasing activity is an important challenge for the nation. The key role in this battle is given to the activi-

H. E. (2007) "Physical fitness and academic achievement in third- and fifth-grade students", [in:] *Journal of Sport and Exercise Psychology*, 29(2), p. 239.

ties that are conducted during the school day¹⁸. That is also the reason why several other countries in Europe and elsewhere (e.g., Canada, Finland, Estonia) have already started to develop different school-based measures to increase physical activity. Next to home, school is considered to be the best place to alter habits¹⁹ because all children go to school and spend a considerably large amount of their day there. The changes that are made in the school environment are accessible to all children irrespective of their socio-economic background.

As mentioned before, the most effective way to influence children's physical activity is to use multi-component school-based measures²⁰ that have an impact on different socio-ecological levels at the same time. The results and analyses of intervention programs with the goal of increasing children's physical activity have shown that the most important elements to change behavior are:

- changing the school physical environment, both in- and outdoors, so that it would contribute to the goal;

- integrating physical movement and activities into different classes;
- introducing (student- or teacher-) guided physical activity breaks;
- changing the curriculum and the structure of the day so that longer activity breaks may be included;
- diversifying the physical education class;
- promoting active school transportation and increasing parents and teachers' knowledge about the effect of physical activity²¹.

The Finnish program "Liikkuva Koulu" (*Finnish Schools on the Move*) was created to increase physical activity. It includes all the abovementioned elements²². One important characteristic of the Finnish way is that all the schools that have joined the program decide for themselves which elements they use and which they omit. That flexibility is important in making the program popular and effective. Some Finnish schools focus on children's gender differences while providing various physical activities. Other schools start the school day with a set of alternative physical activities or pay attention to longer activity breaks, during which children are offered to take part in different organized games and activities (so-called "active break"). Many schools consider it important to provide

¹⁸ Story, M., Nanney, M. S. and Schwartz, M. B. (2009) "Schools and Obesity Prevention: Creating School Environments and Policies to Promote Healthy Eating and Physical Activity", [in:] *Milbank Quarterly*, 87(1), pp. 71–100.

¹⁹ Dobbins, M., Husson, H., DeCorby, K. and LaRocca, R. L. (2013) "School-based physical activity programs for promoting physical activity and fitness in children and adolescents aged 6 to 18", [in:] *Cochrane Database of Systematic Reviews*, p. 2; Hyndman, B., Telford, A., Finch, C. F. and Benson, A. C. (2012) "Moving Physical Activity Beyond the School Classroom: A Social-ecological Insight for Teachers of the facilitators and barriers to students' non-curricular physical activity", [in:] *Australian Journal of Teacher Education*, 37(2), p. 1.

²⁰ Kriemler, S., Meyer, U., Martin, E., van Sluijs, E.M.F., Andersen, L.B. and Martin, B.W. (2011) "Effect of school-based interventions on physical activity and fitness in children and adolescents: A review of reviews and systematic update", [in:] *British Journal of Sports Medicine*, 45(11), pp. 923–930.

²¹ Haapala, H. L., Hirvensalo, M. H., Laine, K., Laakso, L., Hakonen, H., Lintunen, T. and Tammelin, T. H. (2014) "Adolescents' physical activity at recess and actions to promote a physically active school day in four Finnish schools", [in:] *Health education research*; Kämppi, K., Asanti, R., Hirvensalo, M., Laine, K., Pönkkö, A., Romar, J. E. and Tammelin, T. (2013) "Viihtyvyyttä ja työrauhaa. Koulun henkilökunnan kokemukset ja näkemykset liikunnallisen toimintakulttuurin edistämisestä koulussa", [in:] *Liikunnan ja kansanterveyden julkaisuja*, p. 269.

²² Tammelin, T., Laine, K. and Turpeinen, S. (2013) *Opilaiden fyysinen aktiivisuus. Liikunnan ja kansanterveyden julkaisuja*, p. 272.



the pupils with the opportunity to spend the breaks outside in fresh air. In addition, the schools enable children to move during classes. "Finnish Schools on the Move" is one of the key projects in the field of knowledge and education in the government program of Finland. The goal of the government is to expand the program across the country to ensure one hour of physical activity each day. It is funded by the Ministry of Education and Culture and is organized by the Board of Education, regional state administrative agencies, and other organizations. It started with a pilot phase in 2010-2012. On November 2016, more than 80 percent of municipalities and 70 percent of comprehensive schools (1,700 schools) were involved in the program²³.

In many developed countries schools may take part in similar programs – for example, "Playground Activity Leaders in Schools"²⁴ in Canada or "Take 10" in the United States²⁵. The latter is a classroom-based physical activity supporting measure, where teachers can join physical activity and movement with academic education. The program also focuses on healthy eating habits. According to a survey²⁶ conducted in 2009

²³ Finnish Schools on the Move. (n.d.). Available [online]: <http://www.liikkuvakoulu.fi>.

²⁴ Playground Activity Leaders in Schools (P.A.L.S.). (n.d.). Available [online]: http://www.halton.ca/working_in_halton/supports_for_professional_groups/school_health_information_for_professionals/playground_activity_leaders_in_schools___p___a___l___/.

²⁵ Donnelly, J. E., Greene, J. L., Gibson, C. A., Sullivan, D. K., Hansen, D. M., Hillman, C. H. and Washburn, R. A. (2013) "Physical activity and academic achievement across the curriculum (A+ PAAC): rationale and design of a 3-year, cluster-randomized trial", [in:] *BMC public health*, 13(1), p. 307.

²⁶ Donnelly, J. E., Greene, J. L., Gibson, C. A., Smith, B. K., Washburn, R. A., Sullivan, D. K. and Jacobsen, D. J. (2009) "Physical Activity Across the Curriculum (PAAC): a randomized controlled trial to promote physical activity and diminish overweight and obesity in elementary school children", [in:] *Preventive medicine*, 49(4), pp. 336-341.

in the United States, pupils from schools that participated in "Take 10" received better results in mathematics, reading, and writing tests. Moreover, students in the program were 12 percent physically more active than children who did not partake.

WHY AREN'T ESTONIAN CHILDREN ACTIVE DURING BREAKS?

In a 2016 survey²⁷ conducted by the author of this article, we found that lower physical activity level is not necessarily the result of children's own choice. It was discovered that the physical environment of the school and the school rules may stop children from moving. For example, in several schools children are forbidden to run during the break. Curiously enough, the main obstacle is not the lack of space but rather the rules that keep children away from physical activities – mostly to enforce safety rather than allowing creativity and risk.

Most of the students questioned in the survey claimed that they would move around much more during the time in school, if only they were allowed to. The children from grades 1 to 3 and 4 to 6 said that they would like to play more games, chase each other, play hide and seek, run in school hallways, or in the schoolyard. Students agreed that they would be glad to shoot a bow or throw some arrows, hold pillow fights, water gun fights, play with a Frisbee, or dance.

Although students from grades 7 to 9 did not mention such activities as the younger students, they agreed that they would move more, should it be permitted.

²⁷ Lees, M. (2016) *Kehalist aktiivsust toetavad ja takistavad tegurid vahetundides erinevate kooliastmete õpilaste arvamusele tuginedes*, Master's thesis, Tartu: Tartu Ülikool.



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One important aspect is that children prefer to practice activities together. This may be also the reason why many schools have forbidden running outside of physical education classes since it might become dangerous and noisy. The biggest physical activity supporting aspect is when children are offered to take part in some organized games or activities. In interviews, children from grades 7 to 9 claimed that so-called “active breaks” could be organized more often. Unfortunately, children and teachers are lacking the time to organize such breaks, and the breaks are often rather short (10 minutes).

The students agreed that the biggest obstacle was school rules that do not permit the pupils to run or play chase in the hallways. It also became evident that there are some schools where the students are not even allowed to visit the gym during the break – the door remains locked. Moreover, some children stated that they do not

have permission to go outside during the break. The ones who have violated the ban have been punished. The teachers are standing in the hallways and making sure that the rules are obeyed. When the students are not allowed to move, they use smartphones and spend the break in social networks instead. One pupil admitted: “We are more interested in Facebook than playing chase”. Another added: “If you write with someone via Facebook, then you forget yourself and also forget to go and play something with the others”.

The second obstacle is the lack of time – the breaks are just too short for physical activities. And that is a problem, since physical activity helps mental health and improves information processing ability and memory. From the educational point of view, physical activity is very important and education policy should ensure that children have sufficient access to it in schools. And not only during PE classes.

ESTONIAN PRACTICE

Less than 20 percent of Estonian children move as much as the WHO advises – at least one hour a day. Sitting has become one of the inheritable diseases in the modern “sitting-behind-a-screen-society”. This disease should be therefore cured by active intervention, development of skills, changing the environment, and alteration of the norms.

Too much sitting has become problematic in most welfare countries. Instead of rushing to adopt already established solutions, Estonia decided to test the available solutions to find the suitable ones for our situation so that physical activity may be a natural part of the school day. Of course, positive and negative experiences from other countries were analyzed before starting. In 2016, the Research Group of Physical Activity for Health of the University of Tartu in cooperation with the Estonian

Ministry of Research and Education and the Ministry of Social Affairs started the program "Liikuma kutsuvad koolid" (*Schools for movement!*). The researchers, in cooperation with Estonian schools, try to find solutions that would best suit the needs and opportunities of Estonian schools.

The program is currently testing different solutions and collecting feedback. Ten test-schools (located in various regions – from the capital of Estonia, Tallinn, to the small Rõuge parish) have been chosen. The focus is on solutions that the schools have already developed themselves and that are sustainable. The researchers assist the schools with their know-how, but cannot dictate the solutions. The suitable models are found in cooperation. All the test schools are ready to adapt new methods to increase children's physical activity as well as to share their experiences with other institutions.

In 2016, the focus was mostly on the changes that can be adopted during lessons. In 2017, the idea is to train student leaders who would be able to conduct active breaks and school staff to supervise the program in schools. It is also necessary to create a webpage where other Estonian schools could get ideas on how to increase children's physical activity during school.

WHY ARE CHILDREN LACKING PHYSICAL ACTIVITY?

In creating the activity habits of children and youth, there are several elements that play an important role: home, school, social beliefs, and values are among them. For example, more than 50 percent of children from grade 6 claimed that they do not have an opportunity to practice physical activity during the breaks between lessons.

The physical activity level in schools is low because of several reasons. First, the length of the school days and the

size of academic work do not contribute to a higher level of physical activity. The curriculum and the structure of the day do not enable much moving around – 45-minute school lessons have only 10-minute breaks between them. There are a few longer breaks for lunch. This kind of system does not promote being physically active.

Some schools have a lot of space and pupils can use several entrances to go outside and play in the schoolyard. At the same time, there are also schools with narrow hallways or schools which are surrounded by motorways. Although the differences are quite big, we may say that all Estonian schools have some kind of possibilities to enable children to practice physical activities.

The way to school also plays an important role. The goal is that all pupils use active transportation measures (walking, cycling, etc.) for at least some part of their way to school. Unfortunately, children are often brought to school by car and their parents pick them up and drive them home. So the children do not use active transportation – that means, they do not ride a bike or walk on their own. This is also a challenge for local municipalities – school roads for children should be designed in such a way that would ensure safety of active transportation measures.

Attitudes of some people can also pose a problem. For instance, there are people who believe that physical activity of children may be dangerous (the risk of falling on the stairs, bumping one's head against a wall, etc.), that it simply generates noise, or that running may be unsuitable for an academic environment. Thus, the reason for low physical activity may not actually be in small rooms or the lack of time. The so-called "academic atmosphere" is of-



ten thought not to be suitable for running around and shouting with joy – the natural side effect of children playing.

Furthermore, “non-active time” has also become one focus in the physical activity discussion. It often coincides with “screen time”. Children spend more and more time with their phones, computers, or TV screens. In the context of school days, the usage of smart phones is most inevitable. Spending the break leaning against the wall and watching the phone screen influences physical activity and also communication skills. It results in low physical activity and a need for a solution.

So far, physical activity during the school day has been too sport-centered and it is considered to be only a matter of concern for physical education teachers. The parents may think that children do not have to move during the breaks since some of them have additional trainings after school. Unfortunately, those cannot make up for the detrimental effects of a day spent sitting behind desks (with some PE classes intervals a few days a week) has on their health.

Children sit during all the classes and most of the break – which, depending of the grade, may amount to up to seven hours of sitting in a day. A survey conducted by the Research Group of Physical Activity for Health shows that children who are sitting during the break are more tired by the end of the school day²⁸. It is therefore a vicious circle: pupils feel tired and do not want to move around, which makes them even more tired. Two or three training lessons per week do not give children the necessary amount of physical activity. Fortunately, it seems that, in Estonia, all-day sitting has started to be commonly acknowledged as a health threat by scientists, parents, and journalists.

²⁸ Research Group of Physical Activity for Health, University of Tartu, 2016.



PHYSICAL LITERACY – THE PHYSICAL SKILLS, SELF-CONFIDENCE, AND JOY THAT PHYSICAL ACTIVITIES BRING – IS AS IMPORTANT AS READING AND WRITING SKILLS

More and more research proves that the ability to learn and physical activity have a positive connection. Games and activities that are practiced with others also improve communication skills and provide rest from the academic work. So physical literacy – the physical skills, self-confidence, and joy that physical activities bring – is as important as reading and writing skills. It should also be a natural part of the school day.

Some opportunities to be more active are related to changing everyday habits and thus need conscious practicing and adaption of new ways of thinking and behaving. Estonia’s cold climate also makes outdoor activities challenging to organize, but it is an effective way of relieving stress and improving relationships.

The older students also enjoy games. The opportunity to play and run in the middle of the school day helps to manage the

tiredness during the last lessons and make friends with kids from other groups. Even when older students do not want to play, they can walk around or at least stand, which is always better than sitting. Spending the break outdoors is quite common in Nordic countries.

Estonian students also long for an outdoor break. It is, however, crucial to provide organized activities during such outings – for example, by introducing animated active games. There are already some progressive schools in the country where an outdoor break is a norm and children and teachers do not imagine school without it. For example, in Vääna-Jõesuu school, the outdoor break lasts 40 minutes and children can go outside during all seasons. It is not a common practice because most of the breaks in Estonian schools last between 10 and 15 minutes. The parents know and support the decision of school authorities and make sure that children are dressed according to the weather.

Nevertheless, when talking about supporting the children's physical activity, a certain question rises – should it be a school's responsibility? Or is it the parents' problem? It certainly is the latter, but let us not forget that some children do not have strong parental support.

HOW TO MAKE SCHOOLDAYS MORE ACTIVE?

Members of Research Group of Physical Activity for Health have noticed that teachers do not hold the attention of pupils who can only focus when they are sitting still. They rather say that they themselves lack skills and knowledge of how to make the lessons more active – in other words, how to combine teaching and moving. The start may be very small, for example:

- Giving the pupils opportunity to stand up during the lesson or to organize the work elsewhere and not behind the desk;
- Integrating the subject with moving, organizing active breaks for younger children, during which they could dance around or do other fun activities, for instance, accompanied by a video;
- Placing the worksheets around the classroom so that pupils have to get up to get the sheets;
- Using standing up or sitting down (or doing some other exercises) while answering questions instead of raising a hand.

The methods Estonian schools have tested have shown that teachers have more fun working with children when they can move around during a lesson.

Most of the obstacles related to the school's physical environment and house rules are difficult or expensive to change. But not all of them. The rooms can be turned into moving-friendly spaces by using several simple methods:

- During breaks, children are allowed in the gymnasium;
- In the gymnasium, the children may play different games. Some children may organize the games. There can be different theme days, etc.;
- Children are engaged in making school furniture (e.g., ping-pong tables, obstacle tracks). These kind of furniture pieces carry the message that moving and physical activities are allowed in the school;
- Find smart and innovative places where children can keep their bikes and skateboards, especially in small schools where space is limited;

- The parents could help by not bringing children to school by car. In many cases, children could easily walk. Many schools have car-free secure area so that children can walk to school for at least part of the distance;
- Longer breaks held outdoors enable younger children to run and play outside. The older students may also enjoy spending the time outside with some fresh air.

It seems that it is not very difficult to implement the changes mentioned above. However, this requires a greater awareness of the need for physical activity and cooperation among school boards, teachers, and students who are willing to experiment and employ a more “outside-the-box” thinking.

CONCLUSIONS

Children’s lack of physical activity is a serious problem in Estonia and other European countries. One of the possible solutions lies in school-based measures. Even small changes related to school rules, parental attitudes, school staff, and physical environments (as well as children themselves) might bring much desired results. It is essential that, in addition to dealing with children’s education and mental development, schools devote some thought to children’s physical development. It is only by finding the balance between these two aspects that young people may develop to the best of their potential.

Without a doubt, no changes are possible without the support of local and central authorities in charge of the creation of necessary regulations and legislation as well as funding related to redesigning the physical environment of the schools and purchasing new learning tools. Nevertheless, schools need to maintain enough autonomy to choose the right measures that would work for them – needless to say, the

same model will not work for all schools. Therefore, decision-makers in local municipalities and ministries cannot presume that one can simply develop a manual or a directive that would meet the needs and requirements of all schools regardless of their size, location, or organizational culture. Let us hope that this will be borne in mind. ●



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Private Universities and Their Position in Czech Higher Education



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Tertiary education in the Czech Republic has been a tradition for more than 600 years. In 1348, Charles University in Prague was founded as one of the oldest universities in Europe. Having an excellent reputation for centuries, the sector has been facing a significant drop in international university rankings. In general, Czech public universities have been losing their position compared to their competitors. Why? Is something rotting in the Czech educational system?



ENROLLMENT AT BOTH PUBLIC AND PRIVATE UNIVERSITIES HAS BEEN FALLING DUE TO DEMOGRAPHIC REASONS OVER THE LAST FEW YEARS

CZECH HIGHER EDUCATION

In the Czech Republic, public universities dominate tertiary education. Private universities and colleges account for only about 10 percent of university students. Enrollment at both public and private universities has been falling due to demographic reasons over the last few years. However, private universities have been more affected by this slump. Since 2010, private universities have lost al-

most 40 percent of their students, whereas public universities have lost *only* 14 percent. It should be noted that only public universities receive financial support from the government based mainly on the number of enrolled students, whereas private universities are fully dependent on tuition and other private finances. As such, both types of institutions have large financial incentives to have as many students as possible [See Graph 1].

Private universities tend to have a greater share of students in distance learning than their public counterparts. In private universities, students in distance learning form almost half of the student body, whereas the public university average is not higher than 20 percent. Enrollment in distance learning has fallen more than overall enrollment due to the fact that many students were employed in various government and public sector posts which require a university degree. Since those employees do not need a specific qualification, just a degree, they tended to flock to private universities¹. Private universities are considered to be more flexible, which was another reason for their preference in distance learning. Due to the temporary satisfaction of demand for distance learning, those sorts of students no longer enroll, which has resulted in a sharp drop of distance student numbers, especially at private universities² [See Graph 2].

Another interesting fact is the gender balance. Women constitute about 56 percent of the student body in both private and public universities in the Czech Republic. Location plays a certain role. Public universities are spread over the country and while the greatest number of students are in Prague, there are notable universities in other cities, especially Brno. This is not the case with private universities which are overwhelm-

¹ In general, most private universities are considered less demanding than public universities.

² This applies mostly to Czech and Slovak universities, with some exceptions.

Figure 1: Number of university students in the Czech Republic

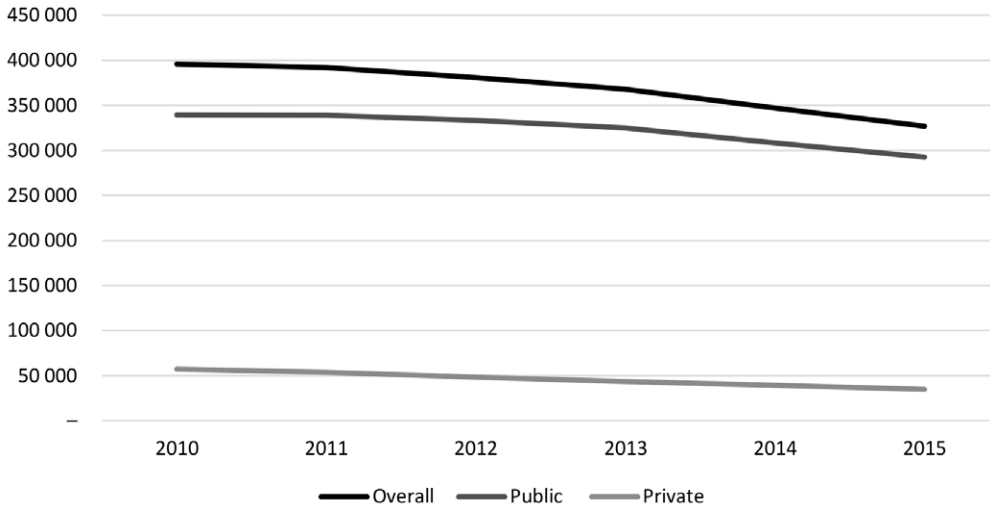
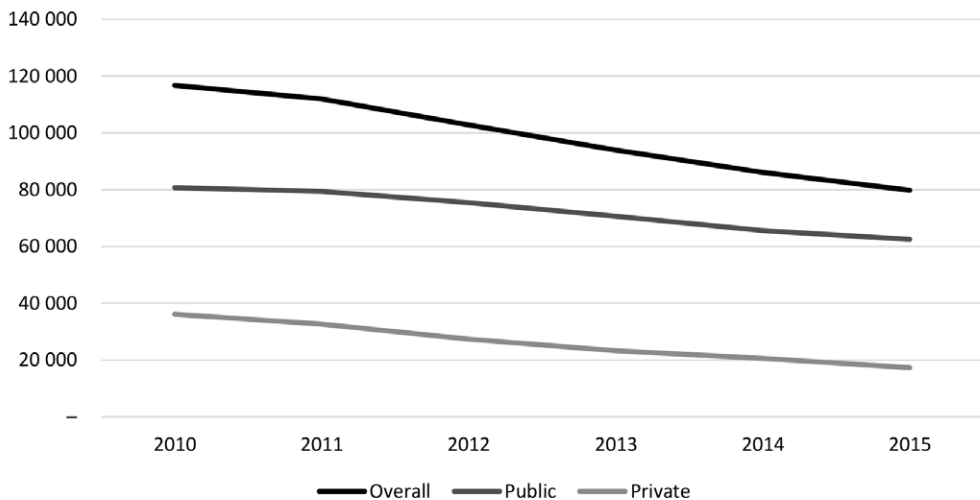


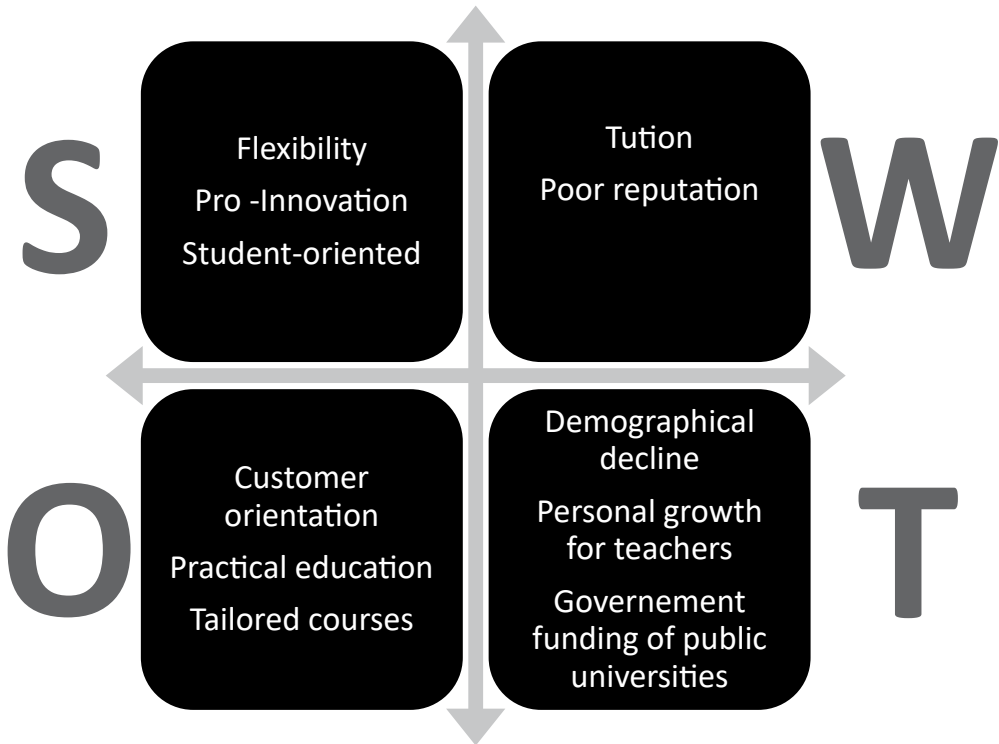
Figure 2: Number of distance students in the Czech Republic



ingly situated in the capital – 72 percent of private university and college students study in Prague. In comparison, there are only 32 percent of public university students in the capital city. As a final note, 12.6 percent of students in public universities in 2015 were foreigners, compared with 18.2 percent in private universities.

PROBLEMS WITH PUBLIC UNIVERSITIES

Almost all public universities are divided into faculties, which have a great deal of autonomy that is guaranteed by law and cannot be limited by the academic senate of the university. This was supposed to change in the latest proposal of the bill of



public universities, but there was such an outcry by academia that the change was dropped. At present, a provost, the head of the university, is a figurehead.

One of the principal issues related to public universities in the Czech Republic is too much democracy, since the most "sacred cow" of education is the independence of public universities. The principle in itself is admirable. The practical application in Czech university education, however, is not.

The end result is stiffness, rigidity, and inertia. While deans of faculties have considerable power, they are elected by faculty senates which tend not to favor individuals interested in disturbing the *status quo*. At least one-third of senate members are students, who are mostly under the strong influence of their professors or other senate mem-

bers who support the status quo. Deans are mostly long-term members of faculties. Thus, most universities tend to exist as they had in the past with minimal innovation.

SWOT ANALYSIS

- **Potential Strengths of Private Universities**

Private universities are less bound by institutional and personal traditions. That could allow them to offer more up-to-date education and make it easier to replace poor educators. Since students pay for their education, there is an expectation of better services rendered to them.

- **Institutional and Personnel Flexibility**

Since private universities in the Czech Republic are at most less than 30 years old, they suffer much less from institutional in-



THE FIRST PRIVATE UNIVERSITIES WERE FOUNDED AFTER THE VELVET REVOLUTION IN 1989

ertia. Most public university departments are ancient, having existed for decades at least. That results in many things being done inefficiently because “that is the way things have always been done”.

In most public universities, individual departments are generally staffed by people who studied an undergraduate program in that department, then studied graduate and postgraduate programs, and will likely continue working in the department until they retire.

Private universities, on the other hand, are much more flexible in recruiting lecturers. Usually, they combine employment of local teachers coming from public universities and colleges together with professors hired from abroad or lecturers from a business background. Removing bad teachers is also considerably easier to do since there is no “old boys network” preventing it.

• **Up-to-Date Curriculum**

In public universities, many programs have not had their curricula updated for ages. In contrast, private schools should be able to react quickly to changing demands on the job market and provide attractive study

programs as tuition is one of their major financial sources and the market is very competitive.

• **Student-Oriented Environment and Lower Teacher-to-Student Ratio**

Private universities have to try much harder to gain and keep students than their public counterparts. In general, they have fewer students per teacher than public universities. That allows them to offer an individual approach as well as individual study plans. Those ensure to students a possibility to combine part-time work with their studies, which enables them to build up their professional career during their studies.

• **Potential Weaknesses of Private Universities**

Several areas pose potential threats to private universities in the Czech Republic. The two most apparent include tuition for the study programs and the reputation of a respective institution.

• **Tuition**

In the Czech Republic, students do not pay any tuition at public universities. Therefore, public universities will always be the first choice for many, if not most, students. People prefer education free of charge and very often choose a private university when they are not admitted to a public one.

This means that private universities have to offer other advantages to students. These can be as completely different as almost effortless degrees on the one hand to higher-quality education or better services for students on the other.

• **Reputation**

Private universities do not have as good a reputation as public universities, partially because they do not have a very long

tradition. During the communist era, only state-owned universities existed. The first private universities were founded after the Velvet revolution in 1989. Still, they are generally considered to be institutions offering an easy way to get a degree, not an education. In general, public universities can afford to be demanding because of the constant interest of students due to no tuition. On the other hand, private universities are forced to offer an easier path to gain a university degree when competing for students.

There is also a deeply rooted mistrust toward the motivations of private university owners. However, not all non-public universities and colleges are profit-seeking. About 40 percent of them have the legal status of an NGO and are run in a non-profit manner. The first non-state university established in Prague 1990, Anglo-American University, which is also the first university in the Czech Republic with American accreditation, was non-profit.

- **Opportunities**

There is untapped potential in the form of students of private secondary schools. Moreover, as already mentioned, since private universities are much less bound by tradition, they can offer a more practical education than their public counterparts. There is also the possibility of direct cooperation with companies to prepare their future workforce.

- **Quality Education and Student Services**

Students coming from secondary schools are used to a certain level of student services which are not provided by public institutions. However, there is a distinct difference as some of the private secondary schools are considered to be listed among

the best secondary schools in the country, which is certainly not the case for all private universities at present.

Nonetheless, for the high-quality ones (offering innovative programs, qualified teachers, and demanding efforts from their students), a combination of strong marketing based on flexibility and good student service coupled with quality teaching seems a promising way to go.

- **Practical Education**

Private universities are mostly offering commercially- and business-biased study programs, such as business economics, marketing, commercial communication, and private law, with the focus on practice. They are often cooperating with external lecturers from business who share personal experience with students and offer practical insight. Such curricula (less theoretical and more practical) attract students with well-defined interests and a clear idea about their future job.

- **Threats**

The most obvious threat is the declining number of students graduating from high schools. There is also the ever-present problem of competition from public universities which receive funding from the government. Last but not least, another issue hampering private universities is their dependence on the public education system to educate their future teachers.

- **Demographic Decline**

The number of students has been dropping for the last few years. Trends for the near future, too, are not encouraging. The number of students in high schools has been dropping for the last 10 years from 576,585



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students to 427,107 students³. A possible solution to this issue is to attract students from abroad – either degree-seeking or study abroad students coming for a semester or two.

As such, the only way for some private universities facing survival difficulties might be to merge with another institution. It looks like the higher education market will solve the unsustainable state of too many low-profile private universities by pressure toward reducing the number of private universities, the better-quality ones surviving.

• **Universities Funded by the Government**

In 2016, the Czech government spent about 21 billion Czech crowns (app. EUR 777 million) on tertiary education. Despite the fact that this sum is considerably high,

³ <https://www.czso.cz/documents/10180/34193311/2300421623.pdf/6083b745-1628-4009-a809-ddfaab4c878a?version=1.3>

the universities' representation is constantly asking for higher funding levels (by about 20 percent). The sum was allocated almost completely to public and government universities, and apparently there are no proposals to change the legislation in favor of supporting private universities.

• **Career Growth for Academic Lecturers**

Czech university study programs are mostly structured in accordance with the Bologna treaty process. Almost all universities⁴ follow the same 3+2+3 years structure (3 years of undergraduate studies, 2 years of graduate studies, 3 of years doctoral studies). There is, however, a difference between Czech and Western European academic career advancement, where teachers can aspire to a title of docent or professor. Those titles are awarded by universities after a formal process which usually requires a teaching practice as well as a number of published articles and books. These titles are transferable among universities (i.e., if a professor changes one university for another, his/her title remains and is fully valid), are highly prestigious, and gaining them is the goal of most university teaching staff.

However, the titles are not mere vanity because the government requires a certain number of docents or professors before it allows a university to run any study program beyond a bachelor's degree.

At the moment, no private universities in the Czech Republic offer post-doctoral advancement. And few offer doctoral study programs. The reason is simple – as they are not financially supported by the government and struggle with a declining number of students, they are mostly not able

⁴ With few exceptions, such as faculties of medicine which offer a single 6-year program for medical doctors.



to invest in their own research. This means that private universities are dependent on public universities in educating their future lecturers and providing them with career advancement.

As a result, lecturers often work for several universities at the same time, both private and public. This also poses a danger for private universities since there are repeated efforts by some lawmakers to curb this phenomenon. For example, a law was proposed that would condition work on more than one university on the agreement of a professor's home university. The home university would have little reason to grant this request. Another legal danger was a proposal to condition employment on a minimal number of hours spent teaching, which would probably lead to the closure of some programs.

Overcoming this weakness by private universities establishing their own post-doctoral advancement would be far too costly in terms of money and personnel. However, it is a real challenge for private universities in the Czech Republic (and similarly, in Slovakia).

CONCLUSIONS

There is undoubtedly a niche in the private tertiary education market in the Czech Republic. It is clear that, at the moment, private universities cannot challenge public universities in research. They should instead leverage their strength and offer practical tertiary education with an individual approach for students. That seems to be the right way to differentiate themselves from public universities and justify their tuition.

Moreover, private universities need to keep offering greater flexibility to their students and generally be more "user-friendly" places than public universities by giving advan-

tages such as individual study plans, strong student and alumni communities, and interactive courses.

Yet another option is to resign themselves to being just a "diploma factory". After all, it is likely that there will continue to be a large number of people willing to pay to get their degree with as little effort as possible. Doing this is quite depressing, and so let us hope that the Czech higher education market and its institutions will create a parametrical environment where incentives for real quality to prevail. ●



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Founder and director of CETA. He teaches at the Faculty of Economics, University of Economics in Prague, where he will finish his PhD studies in economic theory. His research deals with principles and impacts of regulation and taxation (public finance in general), banking and economics of luxury.

MEMBERS OF 4LIBERTY.EU NETWORK

Free Market Foundation (Hungary) is a think tank dedicated to promoting classical liberal values and ideas. The organization's projects focus on advocating a free market economy and fighting racism. The Foundation's activities involve education, activism, and academic research alike, thus reaching out to different people.

Liberální Institut (Prague, Czech Republic) is a non-governmental, non-partisan, non-profit think tank for the development, dissemination, and application of classical liberal ideas and programs based on the principles of classical liberalism. It focuses on three types of activities: education, research, and publication.

Svetilnik (Ljubljana, Slovenia) is a non-profit, non-governmental, and non-political association. Its mission is to enlighten Slovenia with ideas of freedom. The goal of the association is a society where individuals are free to pursue their own interests and are responsible for their actions.

The Lithuanian Free Market Institute (Vilnius, Lithuania) is a private, non-profit organization established in 1990 to promote the ideas of individual freedom and responsibility, free markets, and limited government. The LFMI's team conducts research on key economic issues, develops conceptual reform packages, drafts and evaluates legislative proposals, and aids government institutions by advising how to better implement the principles of free markets in Lithuania.

The F. A. Hayek Foundation (Bratislava, Slovakia) is an independent and non-political, non-profit organization, founded in 1991, by a group of market-oriented Slovak economists. The core mission of the F. A. Hayek Foundation is to establish a tradition of market-oriented thinking in Slovakia – an approach that had not existed before the 1990s in our region.

IME (Sofia, Bulgaria) is the first and oldest independent economic policy think tank in Bulgaria. Its mission is to elaborate and advocate market-based solutions to challenges faced by Bulgarians and the region face in reforms. This mission has been pursued since early 1993 when the institute was formally registered a non-profit legal entity.

The Academy of Liberalism (Tallinn, Estonia) was established in the late 1990s. Its aim is to promote a liberal world view to oppose the emergence of socialist ideas in society.

INESS (Bratislava, Slovakia), the Institute of Economic and Social Studies, began its activities in January 2006. As an independent think tank, INESS monitors the functioning and financing of the public sector, evaluates the effects of legislative changes on the economy and society, and comments on current economic and social issues.

Projekt: Polska (Warsaw, Poland) comprises people who dream of a modern, open, and liberal Poland. It is those to whom a democratic, effective, and citizen-friendly government is a key goal, and who help accomplish this goal while enjoying themselves, forming new friendships, and furthering their own interests.

Liberales Institut (Potsdam, Germany) is the think tank of the Friedrich Naumann Foundation for Freedom dedicated to political issues such as how liberalism can respond to challenges of the contemporary world and how liberal ideas can contribute to shaping the future.

Fundacja Industrial (Lodz, Poland) is a think tank created in Łódź in 2007. Its mission is to promote an open society, liberal economic ideas, and liberal culture, and to organize a social movement around these ideas. Among the foundation's most recognizable projects are: Liberté!, Freedom Games, 6. District. The foundation is coordinating the 4liberty.eu project on behalf of Friedrich Naumann Foundation.

Republikon Institute (Budapest, Hungary) is a liberal think tank organization based in Budapest that focuses on analyzing Hungarian and international politics, formulating policy recommendations, and initiating projects that contribute to a more open, democratic, and free society.

Civil Development Forum (FOR) (Warsaw, Poland) was founded in March 2007 in Warsaw by Professor Leszek Balcerowicz as a non-profit organization. Its aim is to participate in public debate on economic issues, present reliable ideas, and promote active behavior. FOR's research activity focuses on four areas: less fiscalism and more employment, more market competition, stronger rule of law, and the impact of EU regulations on the economic growth in Poland. FOR presents its findings in the forms of reports, policy briefs, and educational papers. Other projects and activities of FOR include, among others, Public Debt Clock, social campaigns, public debates, lectures, and spring and autumn economic schools.

Visio Institut (Ljubljana, Slovenia) is an independent public policy think tank in Slovenia. Aiming for an open, free, fair, and developed Slovenia, the Visio Institut is publishing an array of publications, while Visio scholars regularly appear in media and at public events.

COOPERATING PARTNERS FROM EASTERN PARTNERSHIP COUNTRIES

The Institute for Economic Research and Policy Consulting (Kiev, Ukraine) is a well-known Ukrainian independent think tank, focusing on economic research and policy consulting. IER was founded in October 1999 by top-ranking Ukrainian politicians and scientists, and a German advisory group on economic reforms in Ukraine, which has been a part of Germany's TRANSFORM program. Its mission is to provide an alternative position on key problems of social and economic development of Ukraine.

New Economic School – Georgia (Tbilisi, Georgia) is a free market think tank, non-profit organization, and NGO. Its main mission is to educate young people in free market ideas. It organizes seminars, workshops, and conferences for education and exchanges of ideas. NESG was founded by Georgian individuals to fill the knowledge gap about the market economy in the country and the lack of good teachers and economics textbooks.

DETMAR DOERING

BACK TO HUMBOLDT: WHY EDUCATION NEEDS FREEDOM

PAGE 004

The lack of freedom thwarts human ambition and leads to poor educational performance. And this lack of freedom cannot be compensated by throwing more money into a system which per se is in many ways an obstacle to better education.

JAN ORAVEC

**A VISION OF A FUNDAMENTAL REFORM OF THE EDUCATIONAL SYSTEM IN SLOVAKIA
(AND ELSEWHERE)**

PAGE 018

The current educational system in Slovakia does not please anyone. Teachers are frustrated by low salaries, parents are unhappy with declining quality of schools, employers are unable to find enough skilled people on the labor market, and politicians are always confronted with other policy priorities. There is a general consensus that, after decades of ignoring its problems, this segment of society needs to go through a fundamental reform that would make it fit for challenges of the 21st century.

DARIA HEJWOSZ-GROMKOWSKA

REFORMING THE HISTORY CURRICULUM IN POLAND: THE GOOD CHANGE STRIKES BACK

PAGE 070

If the "Good Change" history curriculum were to contain highly selective facts and was limited to the data, the students would learn distorted history. Moreover, without developing critical and historical thinking, the young generation will be deprived of independent reasoning. Perhaps educating subdued and subordinate citizens is the goal of the "Good-Change Reform". It would be undoubtedly compatible with the political vision of Law and Justice.

GÁBOR HORN

HUNGARIAN ILLIBERAL DEMOCRACY AND THE ROLE OF CHILDREN

PAGE 086

The aim of the current government is to create and maintain a class system burdened with inequalities which would preserve the power of the political elite and keep new generations from the possibilities of innovation and creativity. In parallel to this approach, Hungary exhibits a total centralization of the education system, depriving municipalities of their means and taking away the freedom of education workshops.

PETAR GANEV

EDUCATION AND INEQUALITY: LIBERATING SCHOOLS IN BULGARIA

PAGE 098

The idea of liberating schools goes beyond the classical "private versus public" debate. In the modern EU-type welfare state, it is hard to expect a full swing toward education privatization. But that alone is not an obstacle for opening up the system for all kinds of alternatives, introducing competition between public and private schools, and allowing for solutions such as homeschooling.

MIHKEL LEES

INCREASING CHILDREN'S PHYSICAL ACTIVITY IN ESTONIA

PAGE 130

Less than 20 percent of Estonian children move as much as the WHO advises – at least one hour a day. Sitting has become one of the inheritable diseases in the modern "sitting-behind-a-screen-so-society". This disease should be therefore cured by active intervention, development of skills, changing the environment, and alteration of the norms.