

LIFELONG LEARNING, HIGHER EDUCATION AND THE DEVELOPMENT OF LEARNING COMMUNITIES

Balázs Németh

University of Pécs
2014



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COMMUNITIES***

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Preface
Global-local, Economic-civic: Trends in HE and LLL from a Hungarian perspective

This set of recent papers reflects the work of Professor Balazs Nemeth of the Faculty of Adult Education and HRD at the ancient and very modern University of Pécs. It invites wide reading and reflection within Hungary, in other parts of Europe, and globally.

Nemeth does us the dual service of bringing concepts and ideas, policies and tensions to do with adult education and lifelong learning, and the role of higher education in his own and others contemporary societies, to two readerships. One is in Hungary, a quarter century on from the Soviet era but still uneasy with its place in the ‘new Europe’, where English is not yet commonly read and used. The other is the rest of Europe, in particular. Here the EU and the ‘European project’ are seriously stressed as the diversification of enlargement has become entangled with the aftermath of the global financial crisis. The sharp swing to the anti-EU Right in the May 2014 European elections accentuates Hungary’s own uncertainty. Europe-wide fear about the future takes the form of retreat into somewhat ethnocentric nationalism. Such an environment is anathema to much that the European traditions of adult education and its ambiguous successor lifelong learning hold dear. It is therefore essential for the adult education ‘community’ and the multifarious lifelong learning networks around the world to understand better these different contexts, and truly to connect and interpret the global to the local – and *vice versa*. These papers make an important contribution to this task, and they should be made known through just such networks.

They reflect the work of a great networker and internationalist who has arguably done more to put Hungary as well as the University and City of Pécs on the AE&LLL map than any other scholar. The range of active European and wider organisational links as well as sound and thorough knowledge, straddling government and non-government bodies, is formidable: an essential part of the demanding role of active scholar that the papers reflect. These include UNESCO and its programmes, and such subsidiaries as UIL Hamburg, the OECD, the EU and the Brussels Commission. On the civil society side we have EAEA, EUCEN, PASCAL, ICAE and others. Some of the papers arise directly from these links: the landmark twelve-yearly ‘CONFINTEA’ world adult education conference of UNESCO; the involvement of Pécs and its region in the PASCAL HE and regional development project PURE. Nemeth has done more than any other Hungarian to promote the concept of the learning city; the coincidence of timing with Pécs’ nomination as a European City of Culture, and with the PASCAL project, was a happy one. Another example of connectedness, ‘soft diplomacy’ for Pécs and Hungary, and the enrichment as well as dissemination of LLL concepts, was involvement in the EUCEN Network in 2000 that preceded hosting the EUCEN annual Conference in 2002. Five years later Pécs hosted PASCAL’s annual international conference.

These papers show the reflective reader something of the complex and busy life of an active university lifelong learning leader, and hence of the challenge that policies for university ‘engagement’ and ‘impact’ represent. Typical of the applied aspect is the adult learning action plans for neighbouring Romania and for Hungary itself. The papers also use the knowledge and analytic skills of a leading LLL scholar, adding to understanding especially in the European context; especially, for my money, ‘The Limits and Divisions...’, ‘in the building of an active citizen...’, ‘Lifelong learning, social movements and policy...’, and ‘Managing knowledge through organisational learning...’

The scope of a Faculty known as Adult Education and Human Resource Development makes publishing these papers appropriate (how many universities have a Faculty of such title

and scope today?). Few European universities thus ‘fire on all cylinders’: in terms of scholarship, of advanced professional development (the European Master’s), and in local institution-wide community involvement. In these few papers we see captured the range of work that LLL implies for the modern engaged university, and the vital underlying values this represents: active citizenship, organisational learning and the learning city, combatting poverty and social exclusion, quality, access and mobility, as well as economic development. Given the moral as well as political crisis confronting Europe today, underlying values could scarcely matter more.

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29 May 2014

The Perspectives of Adult Education for Countries in Central-Eastern Europe. Historical and Political Dimensions and Patterns¹

Abstract

This paper will examine and address key issues and reasons which made adult and continuing education in 20th Century Europe to strongly depend on particular social patterns and norms reflecting the status and perspectives of autonomy and intervention. However, it will demonstrate a correlation between underdeveloped markets, open societies and that of closed, autocratic politics.

Therefore, this paper will come to conclusions that it is, consequently, not at all surprising that EAEA and other civil society groups in European adult education, and UNESCO UIL are critically mark the need for more integrated policy developments in European adult learning and education and, also, for more co-operation amongst European states to promote the dissemination of good practices, quality researches in order to balance the economic with more social.

“5. That the necessary conclusion is that adult education must not be regarded as a luxury for a few exceptional persons here and there, nor as a thing which concerns only a short span of early manhood, but that adult education is permanent necessity, an inseparable aspect of citizenship, and therefore should be both universal and lifelong.”

(Ministry of Reconstruction - The 1919 Report, 1919, P. 5.; Reprinted by the University of Nottingham in 1980)

1. Introduction

In the last two hundred years, adult education has become an advocate of modernity, namely, of organised social and economic development of liberalised societies and regulated economic production, and the case of the history of modern British adult education, for example, well underline this argument.² Historical research of adult education in Europe has reflected that even in the semi-developed, modestly democratised states, for a while, favoured the spread of adult education and its movements.³ However, Steele argued that a special rise and fall could be identified in the period of 1848 and 1939, therefore, one must recognise that development of adult education institutions, organisations and movements have always been non-linear.⁴

2. Historical, political and social dimensions and patterns

Even post-modern societies are not completely sensitive to the very relative implications of basic rights of their fellow members. Therefore, it is necessary to turn attention to examples of attempts when the democratisation process reached some states and signals were made to move adult education becoming a part of educational policies in reality. It started mainly at the turn of the 19th and 20th centuries that most Nordic countries passed laws on education to recognise adult schooling and education with equal rights as that of public and higher education. Sooner, the British coalition government set a special commission right in the last year of World War I. so as to make use of adult education in order to prepare for a dramatically changing post-war social and economic environment. The famous *1919 Report* was taken as an outstanding document which recognised adult education as a permanent national necessity and as an inseparable aspect of citizenship and, for this reason, it should be universal and lifelong to promote an intelligent public opinion.⁵

¹ This paper was written in January 2014

² Fieldhouse, 2000

³ Kulich, 1984

⁴ Steele, 2007

⁵ Ministry of Reconstruction - The 1919 Report, 1919

Opposite to these above mentioned political realisations of the importance of developing open and democratic societies, many states in continental Europe, where right wing or left wing extremes took power in the interwar period between 1919 and 1940, chose a different and rather anti-liberal and anti-democratic route, therefore, simply did not allow education policy to represent pluralism of thought, of institutions and, consequently, gave way to authoritarian policy making and systematically got rid of adult and second chance schools. In some countries, governments closed down schools for adults and only allowed or promoted informal adult learning. The growing state-control did not necessarily changed in Central-Eastern Europe after World War II where the emerging communist rule kept strict control over adult education, even though it did support the schooling, education of masses of adults under direct regulations without significant alternative ways, methods of teaching and available teaching materials.⁶ It happened only after 1945 that Western and Northern Europe could turn back to and strengthen the building of liberal democracy and make use of adult education and training in rather balanced forms until the erosion of the welfare state.

A second significant signal for the societal role for adult education was the one of Lindeman who argued, in a very important period of the interwar situation, that adult education would have a role in the development of effective learning, moreover, in social change and, also, in the building of democracy⁷. At the same time, in the Weimar Republic of Germany, Rosenstock and Picht underlined a need for a more systematically structured action in adult education, andragogy, so as to differentiate the action of the education of adults from pedagogy and, simultaneously, from that of demagogy.⁸

Those historical examples call for the limits and divisions of early 20th century's adult education and its struggle for being recognised as a tool, on the one hand, of developing advanced second chance schooling and, on the other, as an appropriate means of citizenship and community development. Accordingly, it must also be indicated that civil societies in Central and Eastern Europe, however, have been very weak to organise their own liberal adult education and reach for wider participation in autonomous ways of community education and adult learning. This is rather obvious in today's conditions and in the practice of adult education leading to limitations in dominant policies towards adult education and training in order to serve labour market interests. Paradoxically, there were much more schools for adult learners in most former communist countries, in between 1950 and 1990, than today, as the return of once reduced illiteracy and functional illiteracy would require the development of basic and secondary education for adult learners being former drop-outs.

The diversification of adult education has dramatically fall back and has been limited to minimal second-chance schooling and many more flexible non-formal training programmes in skills-development for adequate labour. Social and lifelong learning skills/competences are, on the other hand, falling back and adults hardly find spaces of acquiring or upgrading skill becoming necessary in harmonious social life in community, families and at the workplace.⁹

In the post war environment after 1945, it took roughly two decades that European countries got through a significant democratization, even countries of Central-East Europe represented mass education for adults, though systems of education were taken under strict state control. It happened from late 1960s and from early 1970s, depending on countries, that a more social-oriented, a fairly social-democratic policy shift has strengthened adult education in the Western and Northern part of Europe to reach for wider access, 'second chance', compensatory, community-orientations, further education, inclusive policies, etc. Also, the recognition of the social allocation functions of adult education and training reached the

⁶ In relation to Hungary - Pethő, 2000; referring to the former GDR - Opelt, 2005

⁷ Lindeman, 1926; Brookfield, 1987

⁸ Picht, Rosenstock, 1926

⁹ Finger, Asún, 2001, 2004

public policy environment in Europe at the turn of the 1960s and 1970s, roughly at the time when education was indicated to reach a crisis-period, according to Coombs in the Western world.¹⁰ Adult education became interesting and direct means of government policy for a compensatory social allocation mechanism. This process could be understood as a temporary collaboration of social democratic forces to achieve and educational reform in a period of time when business groups wanted to accomplish a modernising shift towards industry and services.

According to Beck education and training of adults was incorporated to the expansion of social space in the sense of 'simple modernisation'.¹¹ The reform attempts of the 1970s were considered as a fair input to the expansion of structures of individual mobility and the expansion of social space in European societies.¹²

The British example is outlined in the famous *Russell-report* which considered adult education as if the economy did not exist,¹³ whereas, new policies later considered adult education and training for the economy as if society did not exist. The Russell-report was researched and written in the time of the final years of the welfare-state when engagement of attention to popular education dramatically changed. Two decades later, social cohesion declined, full employment, as cornerstone of consensus, was dropped off from the political agenda of all parties in the UK. As Russell indicated, in order to link personal, community and vocational interests in civil society, there needs to be co-operation, collaboration and alliances across public institutional patterns and between the state and NGOs. Later on, the market model pushed educational providers to defend institutional interests in order to compete and, consequently, make people to choose alternative provisions where service and combination of time and space were more appropriate.¹⁴

The other example of the period is the internationally well-known *Faure Report* which appeared at a time before the crisis of the welfare state. It implied a conceptual differentiation between policy and that of strategy which have not yet been explored in the adult and lifelong learning literature. In reality, the conceptual frame, according to policy, defined the UNESCO approach to describe adult and lifelong learning as a way of thinking about educational policies of member states. The Report differentiated policy from strategy. It was representing a planning approach which reflected the intervention of a welfare state, at the time, which had not been totally endangered by neo-liberal, determinism, and the globalisation of reductionist economic approaches. The Faure Report took a definitely clear position and called attention to potential threats imposed by mass media and communication and for the promotion of democratic citizenship, environmental protection, and international solidarity. Adult educators and researchers of adult education policy development have to recognise it as a heavy document of progressive policy orientation towards welfare tasks and responsibilities adult education, as part of the system of education, and signalled a need for higher level of state interventions and, also, a higher degree of national sovereignty.¹⁵

Finally, one must indicate the role of the Club of Rome and its famous paper on *No Limits to Learning*. That document called for a more enthusiastic support for learning beyond time and space to allow societies resolving their problems and open up to new dimensions of growth in more holistic and immaterial aspects. Also, the same document called attention to the changing nature and scales of state intervention into education.¹⁶ In the 1970s and

¹⁰ Coombs, 1968

¹¹ Beck, 1992

¹² Bourdieu, 1979

¹³ Jackson, 1997

¹⁴ *ibid*, 1997

¹⁵ Griffin, 1999; Rubenson, 1999

¹⁶ Club of Rome, 1979

onwards UNESCO was one of the few international organisations to keep on promoting lifelong education and adult education, as a definite part of the concept, on track, therefore, its declarations in 1973, in 1985 and after¹⁷ assisted a policy change to come into reality in the second half or, at least, at the turn of 1980s and the 1990s.

For the following four decades adult education and training has had to face several rises and falls and, also, an attempt of moving and keeping adult education as part of educational policies in Europe. The European Unification and the changing climate for a more holistic policy orientation towards lifelong learning opened gates for an embedded adult learning policy line for the newly emerging European Union, its member states and, likewise, to candidate countries. This era could make use of the almost twenty-five years of move of research work on the history of adult education which highlighted some limits and divisions of adult education referring to methodologies used, participation, the changing nature of institution and associations in communities of adult learning, policy directions, local and regional scopes and autonomies of citizens and related responsibilities.

Researches on the history of adult education, which was mainly organised and co-ordinated by a few scholars in Europe from the early 1980s, by such researchers as Pöggeler, Leirman, Zdarzil, Joachim Knoll, Fieldhouse, Field, Turos, and Friedental-Haase and Samolovcev, took particular themes into the focus of research in order to reflect the limits and divisions of the very much divided adult education and training in Europe. Those researches revisited some major documents and policy papers on adult learning and education in a more holistic and interdisciplinary approach. This new positions and major publications has taught us today that, for example, it is rather outstanding for contemporary European adult education, that the 1919 Report has a message for us today, namely, that states of Europe should consider adult learning and education as a national necessity and promote it as the part of welfare citizens may want to make use of.

Researchers, in my understanding, ought to recognise that the evolution of adult education resembles the change of society, therefore, unusual/atypical forms of adult learning must be considered as important and new forms of learning spaces and communities are to be considered. It is rather a wrong position to think only in traditional settings and structures while the history of adult education reflects a process of on-going preparation for change and change for developments in social, economic, political, etc. settings. This phenomenal recognition may teach us to turn the limits and divisions of adult learning of the 20th century for the benefit of new formations of adult education of today.¹⁸

Another pattern of the limits and divisions of adult education is that it slowly lost its direct attachment to social movements. In between 1850 and 1950, adult education could imply several movements and reflect the needs for being educated. It is somewhat paradox, that researchers would need examples of good practice of historical research to prove the social benefit of adult learning and education. Hake, as a good example of positioning historical research, argued that historical development of the availability of education and training for adults can be best understood as the social organisation, by others for adults or by adults themselves, of structures of opportunities for them to gain knowledge, skills, attitudes and values.

Hake stressed that opposite to public education, the historical expansion of the learning of adults and new learning spaces used by them cemented an alternative channel of social mobility through non-formal routes.¹⁹ Early forms of modern adult education in the late 19th and early 20th centuries formed an alternative way of social allocation distinct from

¹⁷ CONFINTEA III

¹⁸ English – Mayo, 2012

¹⁹ Hake, 2006

formal education. In some cases, however, non-formal routes enabled entry to formal qualifications which stayed as a prerogative of public education systems.²⁰

3. *Adult education, the state and social issues*

Pöggeler, pointed out that „In the history of adult education, the interdependence between education, politics, economy, and social life must be considered”.²¹ When researchers of European adult learning and education examine the modernity features of systems of adult education in countries of Europe, they have to realise that the evolution of the state has strongly influenced the impact and roles of adult education upon the development of autonomies of individuals and their communities, depending mainly on political and economic interests.²² In the development of adult education, a significant point was the emergence of the welfare state as it started to form its educational policy based upon the expansion of basic rights to its citizens generally from 1850 and onwards. For adult education, it took until 1950, in Central and Eastern Europe even further, that the process of democratization made most states to recognise that adults would have a basic universal right to learn and be educated. It is a peculiar paradox that there are individuals in many parts of Europe today, who cannot implement this right of theirs, although, they would formally have every right to do so. According to this context, Bélanger rightly underlined the impact of non-working time referring to the development of new social space with new issues.²³

The rather obvious over-polarisation of educational demands on the constraints and claims of work has generated, in the last five decades, an anachronistic situation as adults participate in learning activities in a multiple ways and for various reasons, therefore, one must recognise that the development and changes of educational demands can only be understood through an attention to the social participation and to the new social actors which tend to be fairly autonomous from direct labour conditions, such as feminists, ecological, and other new social movements of particular regions throughout Europe. Problems of environment, population and health cannot be solved without the urge for and commitment to social participation, and on the empowerment of citizens, consequently, on learning provisions to opportunities to increase social and cultural creativity in order to strengthen rationality in collective actions.

It is peculiar how far the analysis of non-working time may clearly reflect that, in the periphery countries of Europe which goes through a crisis in employment, non-working time is extremely away from free-time, hence, became a reservoir of exclusion, of forced employment, thereby, leading to survival actions, a scrutiny for work in the informal or black economy to compensate insufficient salaries, etc.

The relation of current educational policies to adult learning and education has a strong correlation to certain demands, the demand of the labour market, and that of the society. These two demands are rather difficult to meet at the same time, since the first one aims at raising capacities and performance in work, while the other considers production of goods and the maintenance of infrastructures as one and not the only task for citizens. That is why Gelpi pointed out the some educational and cultural realities in the aspect of struggles for development since he argued that a kind of contradiction between the institutional offer and the educational demand was a significant fact about education. Also, he pointed out that a major impasse in the world of education, likewise in adult education, was reflected by the fact that most disadvantaged countries and social groups had the most unmet needs, without benefiting from contemporary civilisation, for example, in the field of education. Gelpi

²⁰ Arvidson, 1995

²¹ Pöggeler, 1996

²² Pöggeler, 1990

²³ Bélanger, 1995

signalled that such countries, which had a limited control over their economies, and workers, who had marginal roles in the labour market without the possibility or with limited positions for negotiation, would be the least able to guarantee formal education to all of their people or, for those who were workers, etc. and for many others in the community.²⁴

Adult education is a form of social policy, the product of deliberate action by organisations to influence society. Youngman underlined that this policy a variety of bodies, including the state and organisations of civil society, to meet the needs, claims and interests of different groups.²⁵ Also he referred to Griffin to explain that the policy making processes involving those organisations were shaped by, for example, competing definitions and narrations of what kind of interventions are useful in the society, consequently, what forms of adult education should be undertaken.²⁶ In his famous book on adult education as social policy, Griffin argued that the policy perspective of adult education drew attention to the part played by adult education in particular progresses: the degree to which it legitimated cultural goals, in particular those having to do with patterns of consumption and leisure, or with domestic, community and social roles. He also highlighted the impact of incorporation of adult and continuing education into manpower policies of the state.²⁷ Simultaneously, Griffin pointed out the roles of the state in adult education, having been described by Styler in the frame of liberal democratic, socialist and Third World models, by arguing that those three models may not be able to fully reflect the limits and divisions of the role of the state in adult education as the state would be interested, in general, in adult education for its functions referring to manpower planning, addressing social priorities, controlling expectations of people, helping social inequalities be reduced, etc. He concluded that all political regimes might use adult education when addressing their social priorities and manage their economies.²⁸

Jarvis called attention to the role of adult education in the development of democracy, and he underlined that the relationship between adult education, learning and democracy was extremely complex. Adult education, nor formalised learning appear essential to the establishment of whatever democracy was, even in the aspect of critical thoughts appearing in the manner of questioning the decisions of elites. I think he was just partially right to underline that adult education and democracy is a political phenomenon, so in this respect, only when the content and method or process, product of adult education are directly political that a direct and significant relationship between them can be traced, and such relationship, according to Jarvis, are rather rare.²⁹ On the other hand It is, therefore, obviously remarkable, accordingly, how recent researches on the history of adult education and policy developments indicate that “the diverse formulations throughout Europe of the ‘social question’ as one of the key issues in the development and organization of adult education.” If we agree with Hake and Laot, than it turns Jarvis’s point paradox as almost every issue is somewhat political in adult education.³⁰

4. Investing in social capital

Today's problems are, paradoxically, reflected by the limits and divisions of adult education. Field warns us that our learning society is constrained by powerful tendencies, not simply towards the reproduction of existing inequalities but also towards the creation of new forms of exclusion. It is helping to erode established social relationships and to call into question

²⁴ Gelpi, 1984

²⁵ Youngman, 1999

²⁶ Griffin, 1987

²⁷ *ibid*, 1987

²⁸ *ibid*, 1987

²⁹ Jarvis, 1990

³⁰ Hake, Laot, 2009

widely held patterns of shared meanings. Field, interestingly, pointed out the reflections of Alheit who, called for a rethink of politics in the light of the learning society.³¹ I presume that the same ought to be done in the roles of lifelong learning policies and the roles of EU institutions in rebalancing social and the economic within adult education programmes for member states.³²

5. Conclusion

This paper comes to conclusions that it is, consequently, not at all surprising that EAEA, other civil society groups in European adult education, and UNESCO UIL are critically mark the need for more integrated policy developments in European adult learning and education and, also, for more co-operation amongst European states to promote the dissemination of good practices, quality researches in order to balance the limits and divisions of adult education for better adult learning with more participation and better performance.

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³¹ Alheit, 1999

³² Field, 2006

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Lifelong learning, social movements and policy, fighting back poverty and social exclusion¹

1. *Lifelong Learning in 2010 and beyond, or the Heritage of the Lisbon-process: Education and Training 2020? Some major premises*

In the past four decades, education and training policy have tried to react in some ways to the peculiar orientation to learning aside by education and training so as to underline the importance of such dimensions of learning as content, spaces, time, costs, and achievements, etc. For UNESCO, this orientation has never been torn apart from education and, consequently, it has always been represented through the issue of access to education (e.g. EFA – Education for All goals).² The well-known Faure-report, accordingly, reflected a vision of a new society with a changed construction of education.³ Likewise, Husén pointed out major elements of this new, *learning society*.⁴ Paul Lengrand, a researcher and analyst of UNESCO, wrote his outstanding work as basics of this scenario in 1970,⁵ and continued to elaborate upon *lifelong education* to incorporate learning and its nine impacts (e.g. communication, corporal man, time, space, art, the citizen, the ethical domain, technology and scientific spirit). This model described the growing influence of a new order in education and training.⁶

The OECD, on the contrary, connected the strategy of lifelong learning to *recurrent education*.⁷ With this perspective, the OECD gave way to a special approach which would value and recognise individual learning in non-formal settings as equal and essential, referring to the growing sector of non-formal trainings or work-based learning.

The UNESCO, on the other hand, signalled the complexity of the issue through the case of adult education referring to the *Nairobi-recommendations* from 1976,⁸ and to the Paris *CONFINTEA IV-Declaration* calling for the realisation of the *learning society* from 1985.⁹ However, there came a rather sudden silence in the 1980s regarding lifelong learning. Many theories have tried to reflect upon why a shift was inevitably apparent from the model of lifelong or permanent education.

In 1987, the European Economic Community, as a sign of strengthened approach towards modernising education and training, reconstructed its education and training programmes alongside the goals of the *Single European Act* from 1986. This commitment helped education and training to become a significant policy area as a tool to strengthen economic production and social development, therefore, receiving more significant funds from the common budget. At the beginning of the new decade, the European Commission continued its efforts to accelerate the speed of the education and training programmes with well constructed policy principles.

¹ This paper was written in May 2011

² Source: <http://www.unesco.org/en/efa/>

³ Faure, E. et al (1972): *Learning to Be: The World of Education Today and Tomorrow*. UNESCO, Paris.

⁴ Husén, T. (1974): *The Learning Society*. Methuen, London.

⁵ Lengrand, P. (1970): *An Introduction to Lifelong Learning*. UNESCO, Paris.

⁶ Lengrand, P. (ed.) (1987): *Areas of Learning Basics to Lifelong Education*. UNESCO–UIE–Pergamon Press, Hamburg, Oxford. Pp.17-49.

⁷ Organisation for Economic Co-operation and Development – Centre for Education Research and Innovation (1973): *Recurrent Education: A Strategy for Lifelong Learning*. OECD-CERI, Paris.

⁸ Source: http://www.unesco.org/education/pdf/NAIROB_E.PDF

⁹ Harangi, L. – Hinzen, H. – Sz. Tóth, J. (eds.) (1998): *International Declarations and Documents on Adult Education and Lifelong Learning*. IIZ/DVV, Budapest.

2. *The Establishment of the European Union: an Influencing Factor*

The *Maastricht Treaty*, by establishing the European Union, open the gates to the characteristic formation of the education and training policy of the Community, as the Treaty itself underlined the basic goals of this policy set by common decisions of the member states through outlined actions. The Treaty set elementary criteria and principles to develop quality and effective education and training, to promote access and opportunity for all and, accordingly, to enhance partnership in and for education and training. Another issue was to develop the European dimension in education and training based on mobility by increasing individuals' learning achievements and developing essential skills alongside with more investment into ICT tools helping mobility itself. These goals empowered the shift of individual learning into a new frame. Further steps enabled such approach and thinking on learning to spread.

This new approach on education and training was in the European represented by the *White Paper on Education: Teaching and Learning, towards the Learning Society*.¹⁰ This document implies a chapter on fighting back exclusion by second chance schooling (!) and youth work. Another step was to issue *1996 as the European Year for Lifelong Learning*. Many occurring debates reflected the growing interest about the theme and several aspects derived from its meanings to point out and label a new education and training strategy. In the same year, Delors, the former president of the EU Commission, made report on learning for the UNESCO by establishing a rather fine reasoning on learning life and in life itself.¹¹

That is why the European Council decided exactly ten years ago that, according to a peculiar survey of the EURYDICE,¹² it would ask the European Commission to prepare a working document on lifelong learning in order to generate a year-long debate and dialogue over it. The *Memorandum* simply boosted the co-operation between formal and non-formal structures of education and learning with newly emerging teaching and learning methods, tools, contents be applied either in schools or outside the school-system.¹³ However, it is a unique European aspect that active citizenship was strongly underlined in that document next to employability in order to be scrutinised over the year-long debate in the depth of details from October 2000.¹⁴

It turned out from the debate that higher education was not really interested, by the beginning, in an intensive manner in the lifelong learning discourse. In Hungary, only adult education, community education and cultural education specialists, researchers showed interest and took actions for participation in the debate, whilst representatives of primary and vocational education and training tried to join in very soon.¹⁵

Jarvis pointed out in his famous Helsinki-speech in September 2000 that lifelong learning was a key factor in raising socially essential forms of capital, namely, social capital based on 'value-rationality' through the development of human resources, strengthening and developing learning competences and skills.¹⁶ In 2004, Jarvis underlined the importance of

¹⁰ European Commission (1995): *White Paper on Education and Training: Teaching and Learning. Towards the Learning Society*. EC-EUROPE, Brussels-Luxembourg.

¹¹ Delors, J., et al (1996): *Learning: The Treasure Within*. UNESCO, Paris.

¹² EURYDICE (2000): *Lifelong learning: the contribution of education systems in the Member States of the European Union*. Eurydice Surveys. Eurydice, Brussels

¹³ European Commission (2000): *Memorandum on Lifelong Learning. Commission Staff Working Paper*. EC, Brussels, SEC (2000) 1832.

¹⁴ The Hungarian Memorandum-debate was organised by the Hungarian Folk-highschool Society in May, 2001.. Higher education was rather underrepresented! Source: <http://www.nepfoiskola.hu>

¹⁵ Source: *Új Pedagógia Szemle* at <http://www.oki.hu>

¹⁶ Jarvis, P. (2001): *Learning: A Life Enriching Process*. In. Toivainen, T. (ed.) (2001) *Adult Education and Culture, Working Together*. EDITA, Helsinki. Pp. 8-16.

the issue of active citizenship as an integral part of the European lifelong learning policy.¹⁷ Also, he pointed on the emergence and spread of the model of the *knowledge-based society* which, he claimed, had played a key role together with a harsh constraint of global economic crisis in Europe's orientation to education and training, learning be renewed so as to promote growth, competitiveness and employability through combined actions and responsibilities of member states and citizens within them. Jarvis clearly indicated that the *Memorandum* gave a clear indication of the responsible citizen of the society is active (employed!) and takes actions in solving the problems of his environment. The role of education and training is, he concluded, to form the individual becoming both an employable and active citizen of his community.¹⁸

We ought to recognise that the *Memorandum-debate* and its further actions became the tools of the society-oriented 'public-dialogue' over the roles of learning activities as part of the *Lisbon-process* of which higher level frames were the *Concrete future objectives of the education and training systems in Europe* and, likewise, the *Education and training 2010 programme*. These initiatives strongly influenced each and all sectors like public education, VET, higher education, adult education in between 2002 and 2010. Also, they affected various European programmes to develop educational sectors indicated above, on the other hand, they promoted further debates and discussions over skills development, HRD, modernising methodology, better assessment and measures with a proper guidance and counselling, more learning opportunities closer to homes for better learning outcomes reflected in indicators and benchmarks to mark progress for that period.¹⁹

In 2003, a rather contradictory situation occurred: whilst there were a lot of changes having been implemented in the VET sector and higher education to indicate a changing system, detailed analysis of the period signalled that the overall picture of the outcome of European education and training in 2003 was not at all good (e.g. it was clearly reflected in public education through the OECD's PISA survey!) referring to figures of non-scandinavian countries. Therefore, the EU Commission urged further reforms to be achieved in primary education, VET, higher education, partnership with economic stakeholders, and development of R+D+I., but those necessary reforms reflected worsening positions in global comparison.²⁰ Reforms have started, but there were not enough professional dialogues, debates or enough resources around them to achieve effective constructions by introducing changes in education and training. Discussions over lifelong learning continued, for example, over key competencies in lifelong learning²¹, and over main trends and issues in adult education and learning in and after 2006 based on the analysis of EAEA (the European Association for the Education of Adults) and new communication and Action Plan of the Commission.²²

Higher education also joined the discussion on lifelong learning with a more intensive involvement through EUA (the European University Association)²³ and, also, through EUCEN (the European Universities Lifelong Learning Network) after 2002.²⁴ A significant

¹⁷ Jarvis, P. (2004): *Lifelong learning and active citizenship in a global society: An analysis of European Union lifelong learning policy*. Journal of Adult and Continuing Education. Vol 10. No.1. Pp. 3-19.

¹⁸ *ibid*, p. 14.

¹⁹ Süßmuth, R. (2003): *Meeting the Challenges of Lifelong Learning*. In. Medel-Anonuevo, Carolyn (ed.) (2003) *Lifelong Learning Discourses in Europe*. UNESCO-UIE, Hamburg. Pp. 17-27.

²⁰ European Commission (2003): *Education and Training 2010. The Success of the Lisbon Strategy hinges on urgent reforms*. EC-EUROPE, Brussels.

²¹ European Commission (2005): *Key Competencies of Lifelong Learning*. COM (2005) 548 final. EC, Brussels

²² European Commission (2006): *Adult learning: It is never too late to learn*. COM(2006) 614 final. EC, Brussels

²³ Trend reports of EUA: <http://www.eua.be>

²⁴ This issue was indicated by Gábor Halász in the 2009. MELLearn Booklet of Thoughts for Debate. Pp. 31-32. Old. Other source: <http://www.eucen.org>

number of academic researchers indicated from that time onwards that a new systemic framework is under construction in education and training which aims to generate more quality, partnership-based development, and the dissemination of knowledge through ICT-based tools.²⁵ National and international lifelong learning processes became more intensively followed through the MELLearn network by most Hungarian universities and colleges, however, most HEIs became active referring to some concrete topics and themes MELLearn has focused on in the last six years.

3. Recent Challenges after 2010

In 2009, the European Commission decided to dedicate the year of 2010 as a turning point with actions against poverty and social exclusion.²⁶ The aim was to raise interest and commitment referring to those issues, and, to initiate common actions in and by the member states. One choice for such step for change is to involve non-governmental organisations and the institutions, organisations of education and training in order to involve as many people in lifelong learning as possible, raising their individual skills and competencies for employability and active and responsible citizenship as *the Lisbon-process* has demonstrated that very serious economic and social obstacles hit back against through growing poverty and emerging social exclusion, therefore, learning for jobs and better social roles could be an effective agent to fight back those dangerous challenges. It turned out that higher education ought to take a leading role in that battle by promoting quality-centred education and research, developing, for example, education and further training of teachers and trainers in public education, adult education, community and cultural education. At the same time, it should enter into concrete actions in local and regional dimensions to help lifelong learning outside the school-system, namely, giving impetus to non-formal and informal learning and, also, helping validating those kinds of learning activities, skills.

By the impact of the OECD, indicators and benchmarks have been set up to help measuring lifelong learning three-five years after the millenium, thereby, actions in countries became more comparable, yet, comparisons have also indicated differences in lifelong learning amongst EU-member and candidate countries.²⁷ Such measures were also taken by the OECD and the UNESCO.

The MELLearn Conference of 2009 in Sopron dealt with the issue of higher education roles for the development of participation in lifelong learning of adults between the age of 25-64 and to improve their access to, maintenance of learning and motivations for learning. Although, in order to achieve such task, a more effective and quality-centred university management, leadership and development is required to be onboard so as to take such a role in the era of the contradictory Bologna-reforms.²⁸

In the meantime, a more serious partnership and dialogue must be built amongst education and training institutions and organisations which represent various levels and sectors. This is inevitable in order to explore the practices of lifelong learning in national, local-regional aspects when trying to define the difficulties and obstacles to learning in individual and community forms and to recognize and disseminate good practices for application referring to the recommendations of the 7th National Congress on Education (VII. Nevelésügyi Kongresszus).²⁹ We presume to underline such measures for the reason that key issues and priorities for action focus, apart from the development of school education, on

²⁵ Field, J. (2006): *Lifelong Learning and the New Educational Order*. Trentham Books, Stoke on Trent.

²⁶ Source: <http://ec.europa.eu/social/main.jsp?langId=en&catId=637>

²⁷ http://ec.europa.eu/dgs/education_culture/publ/pdf/education/benchmarks_en.pdf

²⁸ Source: <http://www.mellearn.hu> – The Strategies, Technologies and Methods of the Learning and Knowledge Society. 5. MELLearn Conference Proceedings.

²⁹ Source: http://www.nk7.hu/nk7_files/File/ajanlasok/szbajanlasai.pdf

raising learning activities and learning capacities of adults with a strong commitment to promote learning skills, because many adults have shortages or lack of basic skills which result in blocking their successful performance at either social or economic stages. This scenario also refers to higher education in the aspect of education, research and development, innovation roles. A key policy issue for lifelong learning will be the expansion of the third mission of universities in the context of knowledge creation and application for all societal groups!

In the Fall of 2009, the European Commission launched a strategic plan reaching out to 2020 in order to set a smart, sustainable and inclusive growth. Therefore, the Commission published the strategic plan and generated a debate over the overall document and its sections until mid-January 2010. We consider major recommendations of that Strategy, on the one hand, presumes the participation and strong alliance of education and training with a key role given to higher education and, on the other, depends heavily on a successful lifelong learning program and actions of the member states and individual citizens in adult learning and education. Major elements of the *Europe 2020 Strategy* is as follows:

- **Smart growth** - fostering knowledge, innovation, education and digital society;
- **Sustainable growth** - making our production more resource efficient while boosting our competitiveness;
- **Inclusive growth** - raising participation in the labour market, the acquisition of skills and the fight against poverty.

The Commission proposes the following EU headline targets for 2020:

- 75 % of the population aged 20-64 should be employed;
- 3% of the EU's GDP should be invested in R&D;
- The "20/20/20" climate/energy targets should be met (including an increase to 30% of emissions reduction if the conditions are right);
- The share of early school leavers should be under 10% and at least 40% of the younger generation should have a tertiary degree;
- 20 million less people should be at risk of poverty.³⁰

It is worth recognising that this Strategy for 2020, from the aspect of a lifelong learning approach, can only be achieved, altogether or partially, in case education and training systems in the European Union will make use of growing national funds and EU-grants in planning and achieving programmes and projects alongside with national goals, in exploring local and regional factors, and participating partnership-based developments and innovations. One basic condition and principle to this is a clear engagement in co-operation amongst public education, VET, higher education, adult education providers so as to promote higher number of learners, better learning results, and more enthusiasm towards learning itself. It is worth examining who has what role in that process!

4. The Impact of UNESCO CONFINTEA VI

Another outstanding programme which has influenced the current debate and reasoning over lifelong learning is UNESCO CONFINTEA VI and its *Belém Framework for Action*.³¹ According to the document, „it is necessary to underline that adult education is recognised as

³⁰ Source: <http://www.2010againstopoverty.eu/news/news/news29.html?langid=en>

³¹ Source: <http://www.unesco.org/en/confinteavi/single-view/news/belem-framework-for-action-available-online-in-six-languages/back/5446/cHash/51289e14ec/>

an essential element of the right to education, therefore, we have to enable all young people and adults to exercise this right.”³²

The *Belém Framework* clearly signals that „literacy is the most significant foundation upon which to build a comprehensive, inclusive and integrated lifelong and life-wide learning for all young people and adults.”³³ It also points out that „we have to redouble our efforts to ensure that existing adult literacy goals and priorities, as enshrined in Education for All (EFA), the United Nations Literacy Decade (UNLD) and the Literacy Initiative for Empowerment (LIFE), are achieved by all means possible.”³⁴ The education of young people and adults, the document stresses, enables individuals, especially women, to cope with multiple crises and changes. „Therefore, we recognise the key role of adult learning and education in the achievement of the Millennium Development Goals (MDGs), Education for All (EFA) and the UN agenda for sustainable human, social, economic, cultural, and environmental development, including gender equality.”³⁵

The *Belém Framework* considers that „the role of lifelong learning is critical in addressing global educational issues and challenges. Lifelong learning is a philosophy, a conceptual framework and an organising principle of all forms of education, based on inclusive, emancipatory, humanistic and democratic values; it is all-encompassing and integral to the vision of a knowledge-based society.”³⁶ It continues with the recognition of the four pillars of learning: learning to know, learning to do, learning to be and learning to live together.

Therefore, „adult learning and education represents a significant component of the lifelong learning process, which embraces a learning continuum ranging from formal to non-formal to informal learning.”³⁷

The document concludes that „adult learning and education are also an imperative for the achievement of equity and inclusion, for alleviating poverty and for building equitable, tolerant and sustainable and knowledge-based societies.”³⁸

It is obvious that higher education, according to the Cape Town Statement of the UNESCO from 2001, has got a key role in the development of lifelong learning and active citizenship within and outside the school-system in co-operation with stakeholders promoting continuing and quality learning.³⁹

We are looking forward to receiving reactions to these thoughts and also to the keynote of the first day plenary session.

³² UNESCO (2009): *Belém Framework for action*. UNESCO UIL_ CONFINTEA VI, P. 1.

³³ *ibid.*, p. 1.

³⁴ *ibid.*, p. 1.

³⁵ *ibid.*, p. 1.

³⁶ *ibid.*, p. 1.

³⁷ *ibid.*, p. 1.

³⁸ *ibid.*, p. 2.

³⁹ UNESCO (2001): *Cape Town Statement on Characteristics Elements of a Lifelong Learning Higher Education Institution*. UNESCO-UIE, Hamburg.

In the building of an active citizen: the crossing of aims of liberal politics and of urban adult education movements at the turn of the 19th and 20th century Hungary¹

A Tribute to Prof. Dr. Franz Pöggeler

Abstract

In the history of modern Hungarian adult education, the development of institutions and movements for a more sophisticated and quality teaching and learning has been connected to bourgeois development, industrialisation and urbanisation with emerging liberal thoughts and ideas to strengthen individuals' rights and duties, amongst other sophisticated issues, based on social participation and responsibilities. Major efforts for enlarging participatory learning and education of lower social strata all tried to strengthen citizenship as it was a necessary element of bourgeois behaviour and became rather favourable to non-bourgeois lower social groups to copy or to relate to. This paper will reflect some reasons for the rise and fall of adult education movements in Hungary by trying to combine teaching with citizenship education. Also, I will explain why it has become important for modern societies to combine active citizenship with adult and lifelong learning in Central Europe in late nineteenth and early twentieth centuries.

1. A mission for adult education to develop: citizenship and active citizenship

According to Baert, there is no single definition of active citizenship² and active citizenship is an open-ended process. Another essential distinction is that education, higher education and even adult education are important in learning citizenship and to help building collective and multiple identities. Therefore, higher and adult education helps “to facilitate the critical interrogation of dominant cultural codes and symbols in order to help finding connections between power and culture, to encourage the exploration of cultural perspectives and codes embedded in different meanings, values and views, and personalizing the political so as to deconstructing dominant codes of information by discovering personal experiences of learning citizenship.”³

Johnston, however, pointed out that we can learn *about* citizenship when learning is about citizenship as status, but we can also learn *through* citizenship, when we reflect on experiences (practice) of individual and collective citizenship. Also, we can learn *for* citizenship and that is Active citizenship.⁴ In case we share such a model of learning combined with citizenship, we ought to consider that citizenship is generally related to rights (civil, political and social) and participation. On the other hand, according to Baert, *active citizenship is about conscious practice of rights and recognition of status*. It means that the challenge is to redefine democratic citizenship, and social responsibility which are at risk. Eventually, we have to balance between individual freedom and collective interest, and that is a role of participatory competencies.⁵ Jarvis argued, accordingly, that „citizenship is now a responsibility rather than a right and, there is still a fundamental conceptual difference between citizenship and active citizenship – the one about rights and the other about the exercise of responsibility.”⁶ The role of education and training is, he concludes, to form the individual becoming both an employable and active citizen of his community.⁷

I strongly believe that a similar condition and challenge dominated core questions of modernity for the societies of some Central European countries soon after the Age of

¹ This paper was written in December 2010

² Baert, 2003

³ Jansen, 2003

⁴ Johnston, 2005

⁵ Baert, 2003

⁶ Jarvis, 2004

⁷ *ibid*, p 14

Revolution, around the 1850s and 1860s. Let us examine what political and intellectual approaches supported or pushed back this process and what adult education could do to bridge the goals of free teaching and that of liberal political aspirations for building a modern society.

2. *The example of Hungary: political and economic conditions of modernity after 1867*

The 1867 compromise between Austrian and Hungarian political elites gave Hungary a relatively wide internal political and economic autonomy. The political and economic life of the period, in between 1867 and 1918, signalled a systemic and planned modernisation and establishment of necessary infrastructures based upon expanding intellectual freedom, stable individual skills in labour and to developed social environments to respond to the demands of growing responsibilities in the society. Moreover, most governments of the era did not constrain or prohibit free adult teaching as it reflected the mission of some distinguished enlightened intellectuals to open up new dimensions of modernity by strengthening participation through learning experience. It was also the interest of leading political cycles to spread a more open and tolerant attitude amongst people living in a developing urban environment so as to learn for citizenship and useful knowledge through active participation and self-organisation. Another marker of this period was a peculiar approach of political decision makers towards the people, who, by slowly becoming and learning being citizens, formed new and modern community environments to strengthen their basic rights and to make their society changing. Pöggeler calls for the importance of this condition by underlining the role of the people in modern societies, after the Age of Revolution in the mid-eighteenth century Europe, as a basis to expand teaching and education/schooling towards non-aristocratic social strata. This approach could be expanded towards adult education, according to Pöggeler, based on enlightened thoughts, ideals and ideologies.⁸ The political compromise with Austria made it possible for the Hungarian aristocracy and bourgeoisie to develop a more liberal society by introducing new basic laws to establish a modern civic society established on education, health-care, housing and other well-fare policies of the modern state.

Steele points out the condition of an expanding popular education in Europe between 1848 and 1939 referring to *the public sphere* and he refers to this condition to spread in Hungary during the political and economic consolidations in the second half of the nineteenth century, after 1867.⁹ I think the same condition is praised by several historians researching the development of adult education, its movements, institutions and organised forms.

Many of them underline the impact of the developing press, community spaces for modern cultural life (e.g. theatres, museums, libraries, choirs, and other cultural and educational associations of workers, peasants, minorities, etc.) and other popular forms of spreading basic and useful knowledge. Other forms were connected to distinct aims to raise literacy through reading rooms, voluntary associations, and self-education circles in both cities and rural areas. It is peculiar that even the Sunday schools, in many cases, were turned into adult evening schools to provide basic education for adults.¹⁰

Another explanation lies in the thoughts of Hake who, by reasoning the social organisation of adult learning in the period 1890 to 1930 to reflect the *social question*, stresses the impact of divergent responses of churches, industrialist, the bourgeoisie and liberal intellectuals to rising challenges and issues demonstrated by organised workers, women's movement, the suffrage movements, etc.¹¹ This matter was openly raised in Hungarian adult education soon after 1867, but it was significantly accelerated in the neo-liberal era after 1890

⁸ Pöggeler, 1996

⁹ Steele, 2007

¹⁰ Krajnc, 1996

¹¹ Hake, 2000

to 1907 to address the social question through various institutional/organisational forms and their education/teaching practice, therefore, Hake is correct to take, for example, university extension or popular universities and academies as ‘consciously constructed as strategic responses’.¹²

The period what we call *the Age of Free Teaching* (A szabad tanítás kora) in Hungary is generally used for the 1868-1918 epoch when, on the one hand, education was institutionalised from public education to higher education, and on the other, many individual efforts were made to organise, initiate a new public sphere into *alternative teaching outside the school in non-classroom/quasi-school forms for adults* in order to help them getting accustomed to the newly developing society and economy by establishing and developing their basic skills (reading, writing, and counting). Therefore, *free teaching*, in this sense, mainly reflected the ideal of the era that intellectuals (teachers, doctors, other scientists, artists, lawyers, economists, etc.) would have the task and mission to teach the adult public to become more sophisticated, take responsibilities in the society and work effectively. However, *free teaching* also meant that the educated members of certain social strata, especially that of workers, established their associations (*egylet* in Hungarian/*Verein* in German) related to their vocations after 1868-70.¹³

Likewise, educational policy from 1868 turned, besides public education, to popular education and Baron József Eötvös, the first Minister of Public Education and Religious Affairs, and his successors supported the plan of István Türr to establish *popular circles for education* (Népoktatási Kör) in rural cities and, also, in Budapest after 1873. However, Eötvös urged teachers of lower primary schools of public education/people’s school (*népiszkola – Volksschule*) to initiate and participate teaching of adults in the local environment. Secondly, he strongly believed that the dissemination of scientific knowledge would have to follow, or even dominate popular education in order to legitimate efforts of free teaching.¹⁴ The first such classroom for adults, accordingly, was organised in the small city of Czegléd, east of Budapest, in 1872, after his death.¹⁵ However, a significant hesitation and, sometimes, resistance apparently modified many of the ideas and plans to involve and engage more adults in learning through nearby community learning places.

One of the challenges of raising the number of adults in learning was the slow, but on-going stabilization of the Hungarian economy and society which took approximately twenty, twenty-five years resulting in the occurrence and development of an urbanised civic society. That is why the peak of the *free teaching* movement was from 1890 to 1907/1914. The period from 1867 to 1890 was an introductory phase of opening towards a more liberalised society in which knowledge and skills became more and more respected to reflect new forms of intellectual capital as an obvious condition of capitalist economy based on industry, trade and knowledge-production. The change of mentality, thinking and behaviour reflected more tolerance towards other social groups, more responsibility and the claim for a functioning state with well-operated infrastructures to support the new economy of a modern society.

The dominantly German and Jewish bourgeoisie and mostly German-speaking working class movements produced lots of examples of open and popular adult teaching and learning Hungarians and other minority groups soon copied or spread into their own communities. Also, the main historic churches brought some significant foreign examples of organised non-formal adult teaching and learning into Hungary and tried to spread them towards their own communities. This turbulent change of the society helped the realisation of enlightened thoughts many of which had been articulated for decades to make education,

¹² *ibid*

¹³ Felkai, 2002

¹⁴ Béneyi, 1996

¹⁵ Bajusz – Filó – Németh, 2004

teaching, dissemination of scientific knowledge and rational thinking available for a wider population inside and outside urban environments. Another impact of the radically changing society was the rise of workers' movements in national contexts which, alongside with international trends, supported and promoted the education and self-education of workers in order to make them work more efficiently and to organise for, claim better working and social (housing, medication, culture, etc.) conditions.¹⁶

On the other hand, some of the early attempts to educate and teach adults fell and faded away at the turn of the century, however, more modern forms emerged to follow the previous ones, influenced by international impacts and trends, in order to realise mass education and teaching on the grounds of newly established platforms and organisations. Amongst other initiatives, one could find the *Sunday Workers' Training School* (founded in Budapest in 1891), the *free lycee* (founded in Budapest in 1894), the *Urania Association* (founded in Budapest in 1898), the *Elisabeth Folk-Academy* (founded in Budapest 1902) and the *Popular College Courses* (founded in Budapest in 1903 to follow the example of *university extension* in the United Kingdom and Austria). The model of *folk-high schools* was put into practice after World War I and was used by catholic and Calvinist reformed community education.¹⁷

These attempts were all trying to support the spread of the ideal of an active citizen who would learn for citizenship through participating community activities of identity building, skills development, cultural and arts engagement, and several other dimensions. Another key trend at the turn of the century was the challenge is to define a more liberal and democratic citizenship with social responsibility that masses could not hold and enjoy (e.g. the constrained right to vote or the education of women, etc.). Therefore, many adults recognised to make a balance between individual freedom and collective interest through being involved in community and political associations, movements, parties to promote changes through the expansion of civic rights legitimised by participatory actions of citizens.

3. Some reasons of the rise and fall of free teaching in Hungarian adult education and its first modernising period (1868 and 1918)

In order to understand why it was soon after 1867 that modern Hungarian adult education started to emerge, we have to consider how major efforts could be connected to European trends referring to lifetime and contents of actions in adult education institutions and movements.¹⁸ In a keynote lecture at a conference in Dundee, dealing with the history of adult education, Pöggeler argued that there would be eight-nine historic reasons for the rise and fall of adult education institutions and organisations.¹⁹

We have to investigate how those historic reasons can be identified in the context of free teaching.

Accordingly, he reasoned that **the first reasons to influence the lifetime of institutionalised forms of adult education would be a lucky moment or situation to give birth to such an institution, organisation or movement.**²⁰ Hungarian bourgeois modernisation, after 1867, was accelerated by some new laws on education, minorities and on industrial activities and, also, gave an impetus to the institutionalisation of education and training spreading throughout the country by the end of the nineteenth century. This era could

¹⁶ Felkai(a), 1998

¹⁷ B. Gelencsér, 1998

¹⁸ Németh, 2001

¹⁹ Pöggeler, 2000

²⁰ *ibid*

make use of this modernisation and helped free teaching efforts to expand in urban environments.²¹

The second peculiarity would be the tight relationship of an adult education institution or organisation to a certain epoch. This kind of organisation/institution may fall and lose influence, role when its era declines. In Hungary, after the fall of *free teaching/free education* (szabad tanítás), the diversity of education, training and learning was narrowed and education, learning of adults became a heavy political issue to raise the issue of equal opportunities after 1918. Therefore, adult education became an area of community actions dominated by politics and World War I and II did not allow the development of autonomous learning.²²

The third distinction reflects that **institutions with a rather general aim and concept often survived the changes of political systems, therefore, they could successfully adapt their structures and methods to emerging social and political demands.** In Hungary, the concrete engagement and support of politics towards adult education and teaching started in 1868 through the distinguished efforts of István Türr and József Eötvös. Türr's *circles for popular education* (népoktatási körök)²³ and the plan of Eötvös for expanding public education to adults through school-teachers (Néptanítók Lapja/ Journal for School-teachers, 1868) reached some significant results.

Political changes, indicated by Pöggeler, can be linked to the epoch of free teaching, as the peak of that certain period can be directly attached to the neo-liberal era of 1890 and 1908 which started by the liberal decisions of Prime Minister Wekerle's government on education, training and culture and lasted until the apparently conservative approaches of Count Apponyi, a conservative-liberal minister of education to moderate free teaching and harden any autonomous view and practice to develop.

The fourth issue was how differently institutions reacted to revolutions and similar political upheavals. Institutions basing their ideology on a failed political system ended with the fall of that system. However, institutions without political aims often recovered from political revolutions and had more independent existence.

In reality, the era of free teaching in relation to adult education was connected to a liberal political frame in national governance in which the state was one of the actors of adult education and did not try to invade or to dominate the learning of adults. The protestant groups became the most tolerant and open to adult education and leaning, their approach may have been different from that of significant workers' education referring to tools, methods and content. Workers' education received lots of impacts from the German labour movement until the 1910s. The later successful assimilation process and the rise of the figure of Hungarian speaking workers helped workers' associations' stability, growth and autonomy. This trend was symbolised by the expansion of Sunday Workers' Training which was founded by Gábor Baross who was the minister for employment and transport.

Eventually, the people's academies and the circles for popular education took a similar mission. The first one tried to help make learners collect the missing knowledge of primary education as necessary for further education and organised basic trainings for employment, for example for prisoners. Prisoners and enrolled soldiers were supported to learn reading, writing and counting. The People's Academy organised courses/trainings to educate people for new social and economic roles by collecting essential and useful knowledge and, moreover, to organise debates over what they had learnt in current social and economic trends

²¹ Swanson, 2008

²² T. Kiss, 1998

²³ Gyulai, 1895, 2002

and attending several scientific lectures. The Urania-movement after 1898²⁴ and the Popular College Courses after 1903 complemented such efforts.

Workers' education, after 1908, was dominated by political, ethical and ideological thinking. This trend was reflected by the Free-School of Social Sciences (Társadalomtudományok Szabadiskolája), which was jointly organised by trade unions and the Association of Social Science Society.²⁵ One exception was the training programmes of some big firms (e.g. Ganz Machinery Factory) which favoured the spread of optimal vocational skills development, therefore, the quality of labour. The different approaches upon education, and main principles, political positions were confronted at the Congress on Free Teaching in Pécs in 1907 during which major intellectuals and the intelligentsia hold debates over free teaching and its content.²⁶

The fifth reason indicates that the rise and fall of adult education institutions were, in some cases, due to the internal structures, mechanisms of the institutions. In periods of stable political and economic life, the lifetime of institutions was evolutionary with periods of growth and last with a sign of decay, and that means the lack of eternity for adult education institutions.

In the context of Hungarian adult education, there is a correlation in between the rise of free teaching and that of economic prosperity, bourgeois modernity and that of the spread of popular education and cultural, community education events. The issue of autonomous learning could become a social question, in the scope of education, which resulted the fall of illiteracy in between 1868 and 1918 as a direct impact of organised schooling, teaching and cultural activities. These efforts were continued in the 1920s by Kunó Klébelsberg, the famous minister of education who continued making efforts for the development of non-formal popular education.²⁷ Autonomous learning was strongly influenced by the issue of how to spend leisure time. This issue constrained free teaching as millions of learners simply wanted more time to reach for higher, advanced levels of knowledge and intellectual capacities.²⁸ One has to recognise, that *free teaching itself had to decline and fall back as it was strongly connected, as a movement, to the ideal of liberal society, politics and modernised, changing economy.*

The sixth peculiarity in the rise and fall of adult education institutions is that **one can find models for institutions with a new rise after a certain period of fall. Almost every institution with a long lifetime had to pass a period of crisis and decline which later push for a new start or reform of the institution/organisation.**

We have to underline that the relatively short time of free teaching with a five decades period was escorted by declining trends, however, the economic boom in the 1880s brought about the revival of free teaching.²⁹ On the other hand, the fall of free teaching was not sudden and was directly connected to the appearance of conservative and crisis symptoms in the political life of Hungary.³⁰

The seventh impact is the peculiarity of the personality who established the adult education institution/organisation. **The rise of many organised forms in adult education was made by creative individuals with creative ideas and talent mind. But in case the founder influenced too much and did not care about teamwork, the institution would not last longer than the founder.**

²⁴ Felkai(b), 1998

²⁵ Felkai, 2001

²⁶ The Diary of the Congress/ A kongresszus naplója, 1908, 1997; Agárdi: 2008

²⁷ Kosáry, 1995

²⁸ Vörös, 1989

²⁹ Bajusz – Filó – Németh, 2004

³⁰ Koltai, 2008

Free teaching and education were marked by the work of creative intellectuals who initiated and promoted the establishment of new learning places for adults both in formal and in non-formal settings. The variety of and the dominantly non-formal structures have been connected to great personalities in adult education, together with a number of thinker, scientists, researchers for whom it was a mission to disseminate knowledge to the adult public.³¹

The eighth reason of the rise and fall of adult education institutions is that institutions need stable frame of organisation, financing, and management, however, social movements try to realise actions and reflect the impulse of the society facing innovation and change, therefore, they are more flexible than institutions. Movements are not rigidly related to continuous existence, as their mission and activities are more important. They are natural forms of organised actions.

Free teaching in Hungary was, on the one hand, a movement and, on the other, an epoch to frame the rise and fall of several adult education institutions/organisations. As a movement, free teaching was a stronghold to signal the importance of self-made and autonomous learning, whilst it also favoured organised learning actions. This was the first time to integrate the issue of non-traditional groups of adults trying to join education and learning, such as women, adult workers, imprisoned, enrolled soldiers, mothers, the poor, unemployed, people living in rural environments. Free learning programmes let these social groups participate adult education and, in the meantime urge more community actions to open public spaces and places of education, culture, etc. for non-traditional adult learning.

Free teaching and education became a part of modern society's thinking over education, knowledge, lifelong learning irrespective of age, sex and a social responsibility to integrate lower social groups (workers, peasants, etc.) That was one way how people could learn from another social group how to behave, cooperate and share. That is how the Workers' Reading Circle in Pécs was established in 1887.³²

The ninth reason for the rise and fall of adult education institutions indicates that some social movements in the past tried to 'perpetuate' themselves by founding their own institutions of adult education. There are examples of turning a movement into an organisation. **While the clientele of institutions is transitory, movements in adult education have to generate successors.**

It is quite probable that institutional forms, by representing the ideal that the adult learner can join organised learning, can get engaged in learning, systematically informed the essence of aims and principles for their clientele and supporters. The movement of free teaching did not turn into an organisation, however, many adult education organisations and institutions represented its principles, aims which were very diverse and worth being compared I further debates.

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³¹ B. Gelencsér, 1998; Steele, 2007

³² Koltai – Németh, 2002

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Learning Cities, Regions and Learning Communities: Some Characteristics of the Development of the Pécs Learning City-Region Forum and the Messages of the PURE Project¹

1. The Faculty of Adult Education and HRD to Promote Quality Human Resources Development with Adult and Lifelong Learning

Since the millennium, many universities of the former socialist countries have renewed the move towards understanding and making use of university adult and continuing education, as well as lifelong and life-wide learning, in order to promote a holistic approach to higher education management and development. The Institute of Adult Education and HRD of the University of Pécs joined TheNUCE Network (Thematic Network in University Continuing Education) of EUCEN in the year 2000. Our input and commitment to that networking, in accordance with the Memorandum (European Commission, 2000), was the elaboration and analysis of quality assurance in university adult education so as to develop university lifelong learning with two current case studies. However, the University of Pécs could use current working tools and methodology to help university management handle challenges such as better management, quality assurance, curriculum development, policy issues of LLL, marketing, finance and staff development and partnership building.

Networking through EUCEN has helped the University of Pécs to make use of the international experience of partner universities in such important areas as the management of university lifelong learning, a policy for lifelong learning, regional development, organisational structures, e-learning management for lifelong learning, marketing, staff development, financial management, and future trends.

Also, the Institute of Adult Education and HRD of the University of Pécs hosted the 23rd EUCEN Conference in 2002 with a title that would indicate a challenging aspect of complex university management: *'Teachers, Facilitators, Mentors or Managers? New Roles and Competences for Academics in a Lifelong Learning University.'* This event emphasised the need for networking in university lifelong learning in Hungary and the surrounding regions and the challenge to implement new roles and required competences when managing a higher education institution. Most of the forecasted trends appeared in further projects of EUCEN (<http://www.eucen.eu>), like BEFLEX or BEFLEX+ and Equipe and Equipe + which strongly influence current debates on university lifelong learning.

The Institute and, from 2004, its succeeding Faculty of Adult Education and HRD of the University of Pécs placed great emphasis on the quality-development of cooperation with non-university partners, such as cultural organisations, museums, libraries, civic organisations and associations, and local and regional councils. The main driver was embedded in the new vision and practice of university management when trying to change for university lifelong learning. The Grundtvig Programme of the Socrates II. between 2000 and 2006, promoted many lifelong learning initiatives and helped us not to just simply work together with museum experts on how to train museum educators, develop curriculum for such staff members, but also how to learn from them by becoming a more learner-centred organisation. Projects such as EUROEDULT (<http://www.euroedult.feefi.pt.hu>) and DILLMULI (<http://www.dillmuli.feek.pt.hu>) added to this process.

However, between 1995 and 2006, the adult and continuing education programme of our Faculty, which had already been involved in a two-way system of a 3+2 level of college-level degree and a university degree for cultural organisation or management/ personnel organisation or management, became a single BA level of Adult Education (three years). At

¹ This paper was written in February 2011

least four MA programmes (2 years) in Adult Education, Adult Education Teacher, Library-Informatics Management and Human Resources Management referred to the Bologna process, underlining the importance and roles of competence-based curriculum development.

In order to be able to follow the main trends in European adult and continuing education in higher education, the Institute of Adult Education, later Faculty, participated in Grundtvig projects such as ALPINE (Adults Learning and Participating in Education) (http://www.qub.ac.uk/alpine/ALPINE/MAIN_PAGE.htm), between 2001 and 2003, TEACH (Teaching Adult Educators in Continuing and Higher Education) between 2003 and 2006 (Atanasova, *et al.* 2006). These projects accelerated a significant change in our curriculum development, teaching and research orientation, methodology and competence development of the teaching staff by making use of project achievements as research and development tools. In this way, the Faculty of Adult Education and HRD has promoted curriculum development, both to respond to competence changes and challenges in local and regional environment and to integrate current academic approaches into a national and international dimension.

In connection with university lifelong learning and management and the development of adult and continuing education from 2003 onwards, the Institute and the Faculty of Adult Education and HRD of the University of Pécs have been participating in MELLearn (the Hungarian Lifelong Learning Network.) as a founding member. The MELLearn-network has so far organised five national-international conferences to deal with key issues of higher education institutions applying, analysing, researching or developing lifelong education and learning in order to help universities respond to their management issues in relation to lifelong learning and/or local or regional knowledge transfer. Conference themes have reflected APEL (Accreditation of Prior Experiential Learning) in 2004; cooperation with non-educational organisations to develop human resources in 2005; adult education and training functions of higher education; higher education and the economy; training of adult educators; E-learning in adult education in 2006; adult education experiences and opportunities for higher education in 2007; lifelong learning networking and co-operation of higher education institutions as regional knowledge centres in 2008 and, finally, strategies, technologies and methods of learning and knowledge societies in 2009. Researchers of adult education and lifelong learning of the Faculty participated in those conferences and presented their research papers at many occasions in order to have them appearing in the conference follow-up booklets. The Faculty of Adult Education and HRD has constantly been involved in the preparatory management activities of those national conferences and project meetings and, thereby, has potentially influenced Hungarian ways of thinking of university lifelong learning in a wider European and international perspective.

The Faculty of Adult Education and HRD has been involved in other development issues and research to demonstrate its holistic approach to education and learning. First of all, a significant number of Erasmus networking connections has been carried out with scientifically distinguished European and non-European universities in the field of adult education and HRD. A small selection of academic connections includes those from Berlin (Humboldt Universität, Germany) to Leuven (Katholieke Universiteit Leuven, Belgium) and from Torun (Nicolaus Copernicus University, Poland) to Duisburg-Essen (Germany), or from Klagenfurt (Alpen-Adria Universität, Austria) to Rovaniemi (Lapin Yllipisto, Finland). Conversely a well-organised teaching, research and development network welcomed participants from the University of Pécs in many activities both as students and teachers and in research. Therefore, the University of Pécs has always tried to bring in quality work, enthusiasm and reliability with openness whilst insisting on analysing reforms and innovation in university lifelong learning focusing on labour market needs, citizenship issues and social inclusion. One particularly relevant project was the aforementioned Framework Programme V

research project, RE-ETGACE (http://www.socsci.kun.nl/re-etgace/RE-ETGACE_FinalReport.pdf), between 2003 and 2004, which scrutinised the development and status of citizenship and governance in Romania and Hungary.

Two further projects that sought to demonstrate quality research in the field of higher education's involvement in the development of local and regional learning organisations were LILARA (Learning in Local and Regional Authorities (www.lilaraproject.com) and PENR3L (www.penr3l.feek.pte.hu). Between 2005 and 2007, LILARA targeted issues which influence and challenge learning in local and regional councils and in companies, associations and networks within their sphere of influence. PENR3L united those European universities researching and developing local and regional communities through the support of the Pascal Observatory, an international research network of local, regional universities, and regional and national governments, in strong relations with OECD (see Longworth and Osborne in this issue). An interesting result of the partnership with PASCAL was that the Faculty of Adult Education and HRD of the University of Pécs held the annual international PASCAL conference in Pécs in September 2007,² and the University of Pécs became an official member of the Pascal Observatory in 2008.

By becoming active members of EUCEN, EAEA, PASCAL, and MELLearn, the University of Pécs and its Faculty of Adult Education have been able to follow the main trends and challenges in university lifelong learning, especially in the field of university adult and continuing education and research. Our researchers and experts are regular participants in the European Commission monitoring programmes, such as the Action Plan on Adult Learning (European Commission, 2007) and, with the Institute of Lifelong Learning of UNESCO, on the CONFINTEA process³.

At the same time, we can share our experience with other universities, as in case of the TEMPUS projects (e.g. the TEMPUS 3LUC – Lifelong Learning in University Context : (<http://www.grad.hr/tempus3luc/>) in Croatia between 2006 and 2007 and through the Danube Rectors' conferences (<http://drc.elte.hu>) (e.g. the DRC Conference at Eötvös University in Budapest in September, 2008) and summer schools dealing with University Lifelong Learning (<http://www.drc2007.idresearch.hu/htmls/mainpage.html>).

An important event happened in the fall of 2008 when, eight years after the publication of the *Memorandum*, the EUA (the European University Association) published its *Charter on Lifelong Learning*, making use of EUCEN's BEFLEX and BEFLEX+ recommendations (<http://www.eucen.eu/beflex.html>). We recognise that document as major first step in a complex direction with flexible approaches and tools and regional engagement towards innovation and research. We do believe that an essential part of university lifelong learning is to enable people to understand the main reasons behind the rise of lifelong education and learning and to learn from its almost century-old history and remind higher education that change is the essence of organisational learning when one is trying to recognise the challenges of managing an university of lifelong learning.⁴

2. The Example of the Learning Region Forum – A Chance to Promote a 'new learning climate' by Higher Education through Regional Development

The changing role of Hungarian higher education in local and regional development can be incorporated into recent networking frameworks where there is an opportunity to create new

² See ' *Lifelong Learning in the City-Region* ' PASCAL Conference at: <http://www.pascal2007.conf.pte.hu>

³ See <http://www.unesco.org/en/confinteavi/> for details of the Sixth International Conference on Adult Education (CONFINTEA VI), hosted by the Government of Brazil in Belém from 1 to 4 December 2009, which provided a platform for policy dialogue and advocacy on adult learning and non-formal education at global level. A report on Hungarian Adult Education can be found at the same site.

⁴ Davies – Németh – Pausits, 2010

channels of teaching and learning, to stimulate knowledge transfer between stakeholders, economic organisations, and education and training systems. A new learning climate is based and developed through holistic lifelong learning research that covers not only education and training, but also into research and development systems and other corporate responsibilities of higher education institutions in Hungary.

The Faculty of Adult Education and HRD of the University of Pécs has initiated a discussion amongst the City Council of Pécs, the South Transdanubian Regional Labour Center, the Pécs-Baranya Chamber of Commerce and Industry and the Pécs Regional Training Centre to develop adult education and training in the frame of a 'Learning City-Region Forum'.

The Department for Human Affairs of the City Council of Pécs organised the first meeting for leaders of those institutions and organisations in 2008 where delegates discussed major issues in relation to the planned Forum and its structure. The Faculty of Adult Education and HRD plan to host, each quarter, sessions of the Forum to discuss current trends and issues, and to promote public presentations on adult and lifelong learning related to formal, non-formal and informal settings.

The group's main aim is to develop a better learning climate for adult learners in traditional and new environments, as suggested by Baert (1996) and to help the partners within the consortium to collect and share best practice for quality learning in both economic and social topics within an international, national and regional spectrum. Some other organisations and associations have also joined the initiative, e.g. the County of Baranya, Pécs-Baranya Association for Dissemination of Scientific Knowledge (TIT), the House of Civic Associations/House of Educators, the Pécs Cultural Centre (PKK), Baranya County Cultural and Tourism Centre, Pannon Association for Organising Vocational Training, Multidimensional Association for Development of Pécs and Its Surrounding Settlements, South Transdanubian Regional Innovation Agency and the South Transdanubian Regional Development Agency.

3. The PURE Project and the Participation of the South Transdanubian Region

In the autumn of 2008, the Hungarian Ministry of Education and Culture decided to finance the participation of the South Transdanubia region in South-western Hungary in the research and development project of the Pascal Observatory entitled PURE (PASCAL Universities in Regional Engagement) Project (see Doyle in this issue). From the beginning of 2009, the Pascal Observatory has helped 19 regions from all over the world participate in the project so as to develop their universities' higher education management for innovation, research through partnership building and accelerate learning amongst higher education and economic actors (firms, including SMEs), social partners, local councils, etc.

Core research questions of PURE encouraged partners at the University of Pécs, Kaposvár University, representatives of the Regional Innovation Agency and Regional Research Centre of the Hungarian Academy of Sciences (HAS) to form a Regional Co-ordinating Group to prepare relevant documents and surveys describing the main aspects of South Transdanubian geography, economics, social composition, educational-research-innovation-development potentials, public transportation, etc. together with the key issues and challenges confronting the region. But the essential research questions of PURE simply reflected a group of key issues of regional development:

- “Within universities, how is the ‘third mission’ (i.e. engagement with community and society beyond teaching and research) being developed and implemented?”

- In what ways is the globalisation of the economy changing regional economic, social, environmental and cultural policies? What are the implications for university regional engagement activities?
- What role is national and regional policy on the third mission of universities playing in overcoming barriers to university regional engagement activities?
- To what extent and in what ways are national and regional policies on sustainable development, the implementation of lifelong learning, and on innovation and research policy having an impact on university regional engagement activities?
- To what extent and in what ways is regional (and national) governance and administrative behaviour having an impact on university regional engagement activities?”⁵

The Coordinating Group members from Kaposvár and Pécs organised programmes for two regional visits in Spring 2009 and 2010 of a special Consultative Development Group, which tried to cover those, listed issues within the particular Hungarian environment. On the one hand, not only did the two host universities have to collect their major local and regional partners for discussions with whom they work on educational/training, or research and innovation development, but the visiting scholars who were making the survey met several individual stakeholders to assess the economic, social/political and even cultural potentials of the exact region. This Development Group prepared two follow-up reports on the visits to the region, which became a reflective, concrete package of proposals for development and regeneration by pointing out particular strengths and weaknesses of the region and of its two universities. The Pécs Learning City-Region Forum decided to make use of those visiting reports and to invite Kaposvár University into the Forum. At the same time, members of the Forum proposed to simply consider each proposal through a systematic debate on how to generate a more conscious approach by university management to the planning of research and development and to quality education and training programmes.

In April 2010, key findings of the second visiting report emphasised the impact of some aspects of the regions’ social and economic conditions with these conclusions:

„1. The South Transdanubian Region, like the rest of Hungary, is suffering from economic deterioration; unemployment in the Region is now running at over 18% of the workforce.

2. Although the economic situation is less dire than in Greece, Hungarian public finances are not stable enough to ensure predictable funding levels for higher education institutions. This is exacerbated in 2010 since it is an election year.

3. The Region faces important physical barriers to economic and social integration into the broader European framework. The new highway to Budapest (set to open this Spring) will improve physical connections, and the region’s competitiveness for business location. But the lack of commercial air connections remains a problem, especially for attracting multi-national firms and tourists.

4. The Region faces important social barriers for integration. One example is the difficulty of expanding the use of languages other than Magyar. Another is the difficulty of integrating the Region’s large minority of Roma citizens.

⁵ PURE Briefing Paper 1, Point 2.3 *Research Questions*, p. 2. See <http://www.pascalobservatory.org/pure>

5. The Region is being transformed gradually by its political and economic integration into the European Union. But the process has many contradictions that focus public attention on the negative aspects while understating the benefits. For example, it is ironic that most civic discourse focuses on the negative consequences of the EU, even though most civic initiatives and almost all public improvements in the Region today are financed directly by funds from the EU.

6. On balance, despite the natural frustrations that come with today's very difficult economic context, the CDG find a deeply held optimism about the Region's future. This optimism is shared widely among the growing network of younger civic leaders, many of whom are building strong working relationships with one another."⁶

On the current status and patterns of university-regional engagement the same visiting report concluded that:

„1. We learned much more about the full range of regional engagements that exist at the two principal institutions of higher education in the Region: the University of Pécs and Kaposvár University. Each University has achieved an impressive set of first-rate examples of engagement. The process for achieving these results has been very different in each place, highlighting the importance of flexibility in university-regional engagement initiatives more generally.

2. In the case of Pécs, the term strategic ambiguity characterises the overall character of university-regional engagement. Although parts of the University of Pécs are very old, the unified institution is very new. As a result its different components have diverse traditions, and different points of view about engagement. Instead of sparking controversy by insisting on one unified policy for the entire University, its leadership has for several years encouraged a decentralised approach. The result has been a portfolio of the successful examples discussed in this report. The strength of these successes has recently created a new practice of regular meetings between the University and government leaders, and the first generally worded agreement between them to cooperate on several key issues. This model of gradualism may hold promise for other regions.

3. In the case of Kaposvár, the model is different. Kaposvár University is also a relatively new institution comprising components that have existed for many years and new developments. Unlike Pécs, each component has had a tradition of direct engagement with the city. One city official could not imagine not having strong, direct ties to the University. Consequently university-regional engagement in Kaposvár is much more explicit and direct.

4. In both cases, we observed the emergence of a decentralised network of 'civic entrepreneurs' including younger leaders from local governments, local higher education, and local non-governmental organisations as well as more experienced individuals who serve in mentoring roles. Individuals in this network share optimism about the Region's future, despite their common experience of difficulties today. This network however appears to be poorly connected into the private sector.

5. The variety of engagement models and practices is evidence of widespread acceptance that higher education will play a vital role in the Region's future development. Local and

⁶ PURE Regional Visiting Report 2 – South Transdanubia, Duke *et al.* 2010

regional leaders are developing creative initiatives that leverage the assets of HEIs to benefit the Region. The principal constraint is a lack of autonomy over their own affairs. These are often limited by the need to obtain approvals from national funding agencies in Budapest and/or European funders in Brussels.”⁷

It also became apparent by the PURE survey that South Transdanubia should seek to influence the national policy environment through its different channels in the following directions:

- “to support greater flexibility in university curriculum development;
- to ease pathways to accrediting new programmes and elements in response to demonstrated needs, for example by relaxing the course-coding system;
- for effective transparent credit transfer and progression from technical (VET or further) into higher education, also enabling more continuing education and lifelong learning of adults as well as young people;
- to review universities’ governance, allowing greater flexibility to create spin-off companies from research into commercial activities, allowing part of the surplus to be returned to the University and to support non-profit making endeavours”.⁸

It is obvious that the Region should seek to influence EU funding through the national government to raise the quantum of EU funding flowing to rural and remote areas via the Leader Programme, and for balanced social and economic development that builds on traditional knowledge and skills; Also, the Region should ensure that programmes respond to needs and priorities best known locally.

As a summary on the impact of the PURE project on the development of university regional engagement, one must recognize that a region from a country from the former Socialist-block, a country and its society in transition is in a complex learning process or a ‘learning constraint’. To change its habit towards outlining, establishing, and developing partnership amongst relevant stakeholders and to promote regional development through education/training, innovation and research, and to enable quality learning of individual and organisational formations, is a new experience. The learning city-region initiative has started to direct higher education towards this model in the last 3-4 years so that it can develop capacity, and change direction on co-operation in research and innovation for the development of its human and social capital in a flexible way.

The Pascal Observatory, its former projects, LILARA, PENR3L, and current ones, such as PURE, R3L+ and EUROLOCAL, have given a major push to the implementation of the learning region model and, more concretely, have helped universities to recognize its importance, and to initiate issues and projects on local and regional development, focusing mainly on economic and social affairs and challenges. The Pécs Learning City-Region Forum will, on the one hand, act as a platform for PURE-oriented issues, and, on the other, move those objectives to be more in line with networking in the regional dimension of South Transdanubia. For example it will foster deeper partnership with Kaposvár, Szekszárd and their localities, and, also, with Kaposvár University, as the other regional university participating in the PURE visit programmes. One last aspect of PURE is to foster partnership building of higher education with cultural and heritage cluster developments and incorporate them into the Pécs Learning City-Region Forum so that a development model close to the one currently called ‘the Modern Renaissance’ (<http://www.pascalobservatory.org/pumr>) at some British universities can be built.

⁷ PURE Regional Visiting Report 2 – South Transdanubia, 2010

⁸ PURE Regional Visiting Report 2 – South Transdanubia, Duke *et al.* 2010

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**New forms of mobility in higher education:
Developments in the European Masters in Adult Education (EMAE) and the innovation
potential of Eurolocal and R3L+ projects¹**

1. Goals and Perspectives of the „European Master in Adult Education (EMAE)

The European Master in Adult Education (EMAE) is meant to establish a type of professionalization in adult education which is in its courses and curricula international and intercultural in combination with national approaches on adult education and which is compatible within the European Union. The main idea of the European Master in Adult Education has been developed by European research groups in collaboration with the German Institute for Adult Education (DIE) who were concerned with the state and perspectives of professionalization in adult education.

Partner Universities (Universität Duisburg-Essen – koordinátor; University of Barcelona; University of Helsinki; Western University of Timisoara; University of Ostrava; University of Firenze) and experts developed a common curriculum (Core Curriculum) as core of the mutual Master studies. The Core Curriculum has as common objectives:

- a European Dimension in all study-phases;
- and an enhanced professionalization and quality development in adult education on a scientific basis.

The European Master in Adult Education is in the sense of all participating universities a degree that leads to a professional qualification for the labour market according to high scientific standards. It aims at developing future-oriented competences in the field of adult education that meet social needs with a special focus on the European Dimension.

Students are meant to achieve knowledge and skills that they need to work as adult educators on a scientific basis. Furthermore they are meant to understand, question and reflect adult education within its cultural context and to use their knowledge to develop professionalization. They not only learn to facilitate learning processes for adults but also to place them within a European context and give comparative and mobilising impulses.

2. Admission requirements

At each participating university there must be a regulation regarding admission requirements. Admission requirements to the European Master in Adult Education can vary according to the conditions at each partner university but need to include the following:

- For Admission to the European Master of Adult Education students should have completed a Bachelor degree or higher.
- Acquirements gained in a four-year Bachelor degree should be recognised for the Masters degree.
- Students should provide confirmation of competencies of English language at least at level B1 according to the European Framework of References for Languages.
- Students should show some practical or theoretical experience in the field of education.

¹ This paper was written in December 2013

3. *Core curriculum*

The EMAE is a 120 ECTS study programme. The programme consists of the following parts:²

A) In the part *Core fields of Adult Education in Europe* students will study courses in five key areas in adult education that are of the highest relevance in all European countries, although different approaches and concepts may prevail in the different countries. These are:

- Theoretical Framework (A1)
- Learning and Teaching (A2)
- Management/Marketing (A3)
- Policy (A4)
- Economy (A5)

Students will be introduced common European ground in each of these areas and in addition learn to recognize the existing differences and compare and assess the different approaches.

B) In the part *AE Research in Europe* students will be introduced both to the most relevant fields and trends of AE research in Europe and to research methods. In this part they will also develop an idea for a research project of their own and set up a research design. This research design will also be used as a basis for the final Master Thesis.

Parts A and B are more or less identical in every partner university: The courses belonging to these parts are either offered as trans-national online-seminars for students from all partner universities; or they are offered locally as on-campus courses. In both cases, the courses are designed according to a detailed common concept that has been developed and jointly agreed within the EMAE network.

C) The *Supplementary Course* offer varies among the EMAE partner universities and reflects the individual universities particular strengths and areas of interest. Students choose from the already existing courses in their home university according to their interests and according to the regulations of their home university. Typical offers in this part will include the in-depth study of selected topics belonging to the areas covered by part A, or courses that deepen the research competence of the students. Supplementary courses also include additional offers such as in depth studies of selected topics of specific national relevance or courses to develop additional skills such as e.g. English for education contexts.

D) The *Trans-national Project Work* is carried out online in one of the topics covered in the part *Core fields of Adult Education*. Groups of students from various partner universities work together in designing, realising and evaluating a common trans-national project. Students will acquire competence and skills for working in intercultural teams, planning, managing and evaluating of projects, and applying theoretical knowledge to practice. Students who spend a semester abroad at another university of the EMAE network may also choose to carry out an individual project/study or to undergo a traineeship in a relevant institution in the partner country instead of doing the online transnational project work.

E) The *Master Thesis* will be supervised by a professor either from the student's respective home university or from another university of the EMAE network. Students

² The number of credits to be acquired in each unit can vary according to the agreement of the partners!

will plan and carry out a research project with a European dimension (comparative research or research on a European topic) and present the results in a written report.

European Master in Adult Education Common Core (courses offered in every EMAE university)	Individual courses (offer varies between EMAE universities)
A Core Fields of AE in Europe A1 Theoretical Framework A2 Learning and Teaching A3 Management/Marketing A4 Policy A5 Economy	C Supplementary courses C1 Suppl. Courses (to A1) C2 Suppl. Courses (to A2) C3 Suppl. Courses (to A3) C4 Suppl. Courses (to A4) C5 Suppl. Courses (to A5)
B Research in AE in Europe	C6 Suppl. Courses (to B)
D Transnational Project Work	C7 Extra Courses
E Master Thesis	

4. Descriptions of Core fields

Core Field A1 Theoretical Framework:

This core field addresses adult education as a subject area and discipline of study in Europe. Students will gain an overview of the whole field of adult and continuing education and its different sectors and structures in Europe and will be introduced to theoretical foundations and concepts.

Core field 1 includes two obligatory courses:

- *Essentials of Adult and Continuing Education in Europe*
- *Theories of Adult Education*

Core Field A2 Learning and Teaching:

This core field deals with all aspects relating to the specificities of the learning of adults and the specific role and functions of teachers of adults. Culturally differing approaches to these issues will be reflected. On the basis of theoretical knowledge students will learn to plan and analyse education situations in different contexts.

Core field 2 includes two obligatory courses:

- *European Teaching Theories*
- *Competence and Competence Development*

Core Field A3 Management/Marketing:

Management and marketing skills are gaining ever more importance also in the field of education. This core field deals with the management and marketing strategies of adult education institutions which are characterized by the need to combine economic and pedagogic perspectives and requirements. Both theoretical and practical aspects will be dealt with and are reflected in the light of different European approaches.

Core field 3 includes two obligatory courses:

- *Course Management of Adult Education*

- *Course Needs Analysis and Programme Planning*

Core Field A4 Policy:

This core field addressed the political context(s) in which adult education is situated at national and European level. It deals with different types of actors, with different approaches to adult education policy, different methods and tools of intervention and with the evaluation and analysis of their impact.

Core field 4 includes two obligatory courses:

- *Course Policy of demand*
- *Course European Strategies of Lifelong Learning*

Core Field A5 Economy:

This core field deals with adult education and its relationship to national and corporate economic matters. The issue of funding adult education and lifelong learning is becoming an increasing challenge for today's societies in Europe, and the shares of funding provided by the state, the companies and private individuals respectively are going to be redistributed. In Core Field A5 the theoretical and political assumptions behind these developments are addressed as well as their practical implications.

Core field A5 includes two obligatory courses

- *Course Adult Learning and Consumption of Educational Goods*
- *Course State and market in lifelong learning in European context*

In every core field, the mentioned obligatory courses will be integrated by supplementary courses in order to deepen selected aspects.

5. *Delivery Mode and Student Mobility*

Although a number of courses (mainly those of part A and B) will be taught entirely online, the EMAE is not a full distance study programme. Attendance on campus is required.

Parts A, B and D will be in English. Parts C and E may be either in the local language or in English.

The EMAE programme may be studied entirely at one university. However, students are strongly advised to spend at least one semester at another university of the EMAE consortium. Student mobility is facilitated by a network agreement which regulates the mutual recognition of courses within the EMAE partner consortium.

6. *Transnational (interregional) Project*

During the Transnational Project EMAE students are meant to collaborate in a multicultural context on the basis of practical work. The Transnational Project is carried out by a group or a team of students from at least two different countries. Students take the following steps in working at the transnational project:

1. They find a group of students with different nationalities who would like to work together.
2. The group gives a proposal to the chair of their study course which includes information about the project plan, the background, the aim of the project, the way the group wants to work, the intended results and value of the project and about its chances for realisation.
3. The group works on the topic and realises the project as well as possible.

4. The group writes a report on their work in which they reflect their experience during the project based on theoretical thinking regarding the topic of their project as well as the process of their (international) collaboration.

Students are welcome to consult their university teachers for help in any matters regarding preparation and development of the project.

7. Master Thesis

With the Master Thesis students conclude their studies of the European Master of Adult Education. Therefore the Master Thesis should be closely related to the fields of interest in which the student has been working during the prior semesters.

With the Master Thesis students prove that they are able to work scientifically on a specific problem of adult education with a European dimension. It refers to the state of scientific discourse in Europe and should have an approach to an international or comparative research question. The overall structure of the paper contains an introduction, the research questions, used methods, the acquired results and a conclusion. The Master Thesis can be awarded within a corridor of eight up to 30 ECTS-credits.

The Master Thesis is to be handed in English or the national language of the university where the student is enrolled. It must hold abstract and main conclusions in English language. Further regulations follow the local specifications at the university where the student is enrolled.

8. The EUROlocal project

The use of the terms 'Learning City', 'Learning Town', 'Learning Region' and 'Learning Community' is rapidly becoming commonplace in the European lifelong learning debate. This is logical. After all, cities and regions are the places where lifelong learning is implemented. The European Commission's definition is:

„A city, town or region which recognises and understands the key role of learning in the development of basic prosperity, social stability and personal fulfilment, and mobilises all its human, physical and financial resources creatively and sensitively to develop the full human potential of all its citizens'

The Limerick Declaration, produced by the European Commission's *PENR3L* project in 2008 went further. It identified a number of economic, social and environmental indicators distinguishing learning cities and regions.

The European policy document on the local and regional dimension of lifelong learning published in 2001 made several recommendations, some of which have been implemented. It stated 'No European region can afford not to become a learning region – it is a matter of continuing prosperity, social stability and the wellbeing of all its citizens.' Some European cities and regions are already well aware of the work to be done in order to meet these challenges. Most of Germany is now covered by more than 64 learning regions, the UK and Finnish national learning city networks cover more than 100 members and many cities a diverse range of countries describe themselves as learning cities, Gothenburg, Rotterdam, Dublin, Brno, Pecs, Limerick and Kaunas, to name but a few. Lifelong Learning is recognised as a powerful tool in European and regional economic, social and environmental development. The European Commission has itself supported several projects and programmes to create learning regions notably the *Socrates R3L programme, the TELS, LILLIPUT, INDICATORS, PALLACE, LILARA and PENR3L* projects and several others. These have produced data, tools, indicators, recommendations and learning materials to help

cities and regions understand how they can become Learning Cities and Learning Regions and the benefits resulting therefrom, for example the 'stakeholder audits' for universities, schools, local authorities, small businesses and adult education institutions developed by several of the partners in this project. And yet there are still huge gaps in all parts of Europe. While it can be argued that all cities and regions aspire to the lifelong learning ideal, only a small percentage are actively isolating and addressing the major issues and actions that would transform them into true learning entities, capable of meeting the challenges of the future. Other initiatives from the Committee of the Regions, the Social Affairs directorate, Framework and other parts of the Commission recognise the value of lifelong learning at a regional level, and some individual member states have their own strategies and policies in this field. However, little work has been done to synthesise all this knowledge, nor to disseminate it as a coherent whole to those places where it would be of benefit. Assembling and disseminating the wealth of existing knowledge and development aids is essential. Many of the partners in this project have been engaged in either producing or implementing them.

9. Objectives

The overall objective of Eurolocal is to activate learning region development by producing and continuously disseminating in an attractive and innovative way a comprehensive knowledge database that includes concepts, tools and techniques, learning materials, indicators, diagrams, networks, reports, papers, policies and strategies and recommendations for action from European Commission and other regional bodies projects and reports. In order to do this, EUROLOCAL has started in the last 15 months to:

- study the activities, projects and outputs that have already taken place in Europe, both on a European and at a member state level;
- isolate the tools and materials for informing and promoting action in cities and regions and giving them a thorough test in places where they have not yet been used;
- develop an audit and interview key people in the European Commission, European Parliament and European networks active in this field including DG EaC, DG Social Affairs, DG for Regional Development, The Council of Europe, CEDEFOP, the Committee of the Regions the PASCAL International Observatory on Learning Regions, the PENR3L network, the EARLALL regional network and other bodies responsible for developing and implementing policies in this domain;
- similarly, contact people and networks in member states to ascertain their views and activities;
- update the database of around hundreds of regional development centres produced by the PENR3L project and disseminate the project results to these;
- create a database of the tools, knowledge, initiatives and strategies adopted by leading regions in this field;
- design and develop an interactive website that can present the results in an attractive, culture-sensitive and innovative way;
- design, develop and deliver a final conference for key decision-makers, practitioners in local and regional authorities, associations for regional development and continuing education, industry and business and academics;
- produce a report synthesising current European knowledge, tools and activities, with recommendations for future focus;
- disseminate these to all European Regional Centres, Committee of the Regions and the other organisations that can push forward the development of learning cities and regions in Europe in accordance with the revised Lisbon agenda;
- organise an European conference.

The knowledge and insights produced by all of these actions will expand considerably the number of European regions actively involving themselves in Learning Region construction.

10. Sources of Information

The main European policy and practice documents are to be found on the SCADplus databases within the Europa-website. They include policy documents and White papers from Framework, DG Social Affairs, DG EaC. Lifelong Learning. and other programmes, Committee of the Regions, DG External Affairs. Member State information on lifelong learning have been identified at national education department websites, e.g. DfES in UK. Other web-sites with up to date information include the European Learning Cities Network. This have been supplemented by the audits of all relevant European organisations. Learning Region Initiatives in Member States will be handled by the partners who will use the extensive PENR3L network (PASCAL European Network of Lifelong Learning Regions), a network established by the Commission's PENR3L project to push back the frontiers of Learning Region knowledge and practice and to propagate the Learning Region message in member states.

11. Added Value of international approach

Learning Organisations, Cities and Regions are not the preserve of any one member state. They affect the economic, social, cultural and democratic future of every city, town and region in Europe. Equally the Europe of the Regions is a powerful movement throughout the continent. This is why European cooperation in the development of materials is important, so that, despite cultural differences (which have of course been taken into account during the whole project), the essential body of knowledge needed by individuals in city and regional administrations can be disseminated Europe-wide.

12. Methodology of data collection

EUROLOCAL audits containing the learning region indicators have been used in the TELS, INDICATORS and PENR3L projects. They are accompanied by publicity literature outlining learning region characteristics. The Audits are more than information questionnaires, containing also learning region knowledge, the facility to comment and add relevant concepts and comments and inviting opinion, experiences, ideas and expertise. The data so obtained will be both qualitative and quantitative. The audits have been uploaded onto the website. The website itself is attractively designed to present relevant key information on the home page. It encourages users to access the data they need to take the process of establishing a learning region further. Thus there are sections on tools, learning materials, papers, case studies, courses, reports, seminars and workshops, existing networks, policies and strategies, recommendations for action, projects, international links, and a help line for each European group of countries. Embedded hyperlinks enable users to navigate easily and to find the knowledge they need.

Tools for learning regional development are tested and modified where necessary by the partners. For example, the LILARA learning needs audit, the Stakeholder Audits and the roadmap learning requirements portfolio and the personal learning plan development are being tested in countries where they have not previously been used. This is the task of the four main partners, two of which are universities researching the innovative role of learning cities and regions. The project will end with a large European conference with the support PASCAL Observatory and the European Commission.

Project partners:

University of Glasgow – United Kingdom/Scotland - co-ordinator
Universus CSI Bari Non-profit higher education consortium – Italy – partner
LRD Munich non-profit agency – Germany – partner
University of Pécs – Hungary - partner

13. The R3L+ project

Through the last couple of years the Learning Region initiative has become a widely adopted concept in European education and regional development policies. However during the years the concept has taken different notions and has been reflected in a variety of network figurations. Due to the different departures and pathways each of them has developed domain specific knowledge, in the area of social capital building, regarding good governance and institution building, stakeholder collaboration, public-private partnerships and transversal co-operations. The basic intention of the R3L+ project is to capitalize on this diversity by bringing together actors from the respective countries in order to learn from each other and jointly elaborate a common quality framework for the development and management of cooperative learning arrangements among educational providers, SMEs and public agencies. Findings from recent evaluation showed that a major obstacle towards a broader diffusion of the learning regions concept might be seen in the fact that there is still a lack of common quality instruments, which would allow for trustful and sustainable co-operations among educational actors. Following the priority of the call the project will address this problem to improve the quality in adult education by reflecting good practice to be found in Learning regions in the light of the Common Quality Assurance Framework (CQAF). More specifically the project will capitalize on good practice found in the Learning regions, and further develop a common set of quality methods and instruments to ensure the development, assurance and improvement of quality of learning networks in compliance with the Common Quality Assurance Framework.

From the project results the partners edit a handbook, best practice guide and training module for managers and stakeholders of learning regions, which shall allow for the effective planning, implementation, evaluation and review of co-operations among educational providers within Learning regions.

Project partners:

Ludwig Maximilian Universität München – Germany – project coordinator
P&W Praxis und Wissenschaft projekt GmbH Ingolstadt Research Centre – Germany - partner
LRD Munich non-profit agency – Germany – partner
University of Glasgow – United Kingdom/Scotland – partner
City Conversity AB Lund KKV – Sweden – partner
Kauno Technologijo Universitetas Kaunas – Lithuania – partner
Observator pentru Dezvoltarea Invatarii Permanente ODIP/Observatory for Lifelong Learning Development NGO, Bucuresti – Romania – partner
Nexus Europe Ltd. Dublin Research Center– Ireland - partner
University of Pécs – Hungary - partner

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Making Higher Education to Open up to Adult Learners – An Actual Issue for Quality Education¹

Abstract

This paper is to analyse the state of art in how higher education in Hungary is prepared to open up to adult learners wanting to extend their knowledge and develop skills at an advanced level of education. Also, a detailed description of the roles and functions of higher education in adult learning will demonstrate some particular aspects of lifelong learning, adult learning, higher education and recognition and validation of prior.

1. Key concept and short introduction. Definition of the term “adults” in higher education

The term „Adult” is not directly defined in the Act of Hungarian higher education² as the minimum age for entering into higher education studies is 18, therefore, all students and learners must be at the age of 18 or over, regarded as adults, when entering into universities and colleges (generally in levels of ISCED 5a and 5b) regardless of the level and forms of their education within higher education. Another marker to underline one identical precondition of entering into higher education, and that is *maturation*, which is formally accessible through a set of exams in secondary schools and secondary vocational schools at the age of 18 and afterwards. However, the Act on Adult Education³ clearly defines *who is an “adult”* and this adult person, apart from being able to enter a variety of adult education and training programmes, can officially learn at HEIs in Hungary for either a BA and MA level diploma or a vocation-oriented certificate available through special accredited post-secondary Higher Vocational Training (Higher Education provided VET in ISCED 5b) as *an adult learner by holding a certificate of maturation*. One must also bear in mind that students having finished their studies in HVET are entitled to take relevant credit points into their BA level studies (up to 60 credits as maximum!).⁴

A general process of her/his entry to higher education to Bachelor, Master and Post-Graduate studies is achieved through a formal entry exam and this status enables the adult to become a student of the university or college and hold special rights attached to that status. One can directly enrol to full-time or part-time/distance studies, either at ISCED 5a or 5b. *Students learning in non-full-time formats are recognised as students and adult learners* most of whom are *considered by higher education institutions, according to the HEAD-indicated typology, in majority as recurrent learners, some deferrers or returners*.

The above listed types of adult learners are the ones which Hungarian higher education institutions consider as relevant in functioning and operation of colleges and universities. Again, they are dominantly recurrent learners, some deferrers and returners. There are still no available statistics related to special grouping or types of adult learners other than those with reference only to sex and form/mode of education within the HEI (e.g. full-time, part-time, evening or distance education). The Chapter on statistical data underlines that most adult learners take their studies in part-time mode/form!

One must note that higher education in Hungary developed and has maintained some special roles in the education of adults in special part-time, evening or corresponding

¹ This paper was written in January 2011

² Act on Hungarian Higher Education - CCIV./2011.

³ Act on Adult Education CI./2001. – According to the Act, „*an adult is a person who has already completed her/his compulsory education*” (strictly defined in the Act of Public Education - CXC./2011.)

⁴ <http://www.ofi.hu/kiadvanyaink-110630/aims-and-types-of-study>

forms/structures of education during the last six decades. This kind of rather varying and changing partial role in adult education and learning has not yet turned most universities and colleges to recognise such actions belonging to their mainstream functions until the very end of the twentieth century. The mere emphasis to open up higher education to adults has been there for that period, however, some follow-up policy changes have not constrained academic cycles to step forward a more flexible and adult learner centred structure of higher education which stayed rather closed, in educational functions and orientations, for adults.

2. Criteria (e.g. age, life course) to define “adults” in HE in Hungary according to major groups of relevant adult learners

The OECD categories to define adults in higher education cannot be automatically used in the Hungarian context for the following reasons:

- all students above the age of 18 in higher education studying for a Bachelor, Master or a Doctoral degree are formally considered as adults in legal terms;
- people learning in higher education for a vocation are officially considered as adults learners in higher education in Hungary;
- the European statistical data collection system (Eurostat) applies the age cohort of 25-64 as an indicator to measure participation of adults in lifelong learning and it generates several questions and issues whether students and adult learners who start learning in higher education under the age of 25 may not be counted into/reflected by any lifelong learning indicator.

The OECD categories have not been directly used in Hungarian higher education, however, those categories are reflected in the changing concept of an “adult learner” in higher education from 2005.⁵ That was the time when the newly accepted strategy on lifelong learning of the Hungarian Government heavily influenced law-makers to recognise each and all students in higher education who study in part-time, distance or in evening educational formats both as students and adult learners.⁶ The peculiar aim was to make higher education institutions turn towards growing the number of their non-traditional students with more care, better provision and services as part of university lifelong learning.⁷

Recently, the situation in academic cycles has moved attention to raise the research quality of higher education institutions through some top “research universities” (from 2010 and onwards) and to shift the problem of raising the number of non-traditional students to more “teaching-oriented universities”. The biggest twelve universities in Hungary applied for the status of “research university”, but only the best five was ranked to receive the label in 2010 from the Ministry of Education and Culture. Another five of them were ranked to receive the label of “excellent university”. The process itself was a kind of paying more attention to research excellence instead of moving forward with the Bologna- process, as it is considered as a task formally having been completed by most higher education institutions. Universities and colleges, however, have started to show more attention and interest towards university lifelong learning and adult learners through their short-cycle programmes, vocational training programmes and peculiar distance/e-learning courses. Yet, the number of such programmes have been growing rather slowly and reflects the lack of overall institutional interest, the lack of adult training skills of most lecturers and the lack of

⁵ OECD (1987): *Adults in Higher Education*. Paris: OECD.

⁶ Strategy of Lifelong Learning of the Government of Hungary – Govt. Decree 2212/2005.

⁷ The approach of university lifelong learning has been effectively represented and demonstrated by the Hungarian Universities Lifelong Learning Network Association/MELLearnN since 2003. Please find more at: <http://www.melllearn.hu>

appropriate and flexible curricula, proper teaching methodology and technical facilities. One could easily come to the conclusion that most universities are not yet fully interested in the raising of the number of their students from adult learners, other than from those who would enrol to traditional Bachelor, Master or Doctorate programmes.

3. *Prevailing concepts of adults in HE in Hungary*

The general concept of adults in higher education in Hungary is a bit different from the concepts indicated in the DIE-HEAD *Definitions and conceptions*, as some particular indicators of the approach may not be identifiable in the Hungarian context.

Adults learners in higher education programmes are defined as those who have completed their compulsory education period (according to the new Act on Public Education, it is the age of 16 until which compulsory public education lasts!) and have enrolled to any vocational training, Bachelor, Master or Doctorate programme of the university/college; The age cohort of 25-64 matters in the context of the EC, Eurydice, Eurostat surveys of lifelong learning.

The issue of participation of non-traditional students to represent underrepresented groups as minorities, disabled matters from the point of view of equal opportunities guaranteed by the Act on Higher Education.⁸

Most students, studying for a vocational certificate, a bachelor or a master degree, or even for a Doctorate degree in part-time, distance or evening course formats, can be described as persons who continue their studies which often paired with a family biography.

In the area of access and admission, one must recognize that access is formally open to any adult who holds a certificate of maturation and collects enough entry points through an entrance exam to Bachelor or Master programmes. Vocational programmes are open to all adults holding a Certificate of Maturation. Doctorate programmes require, as part of their admission criteria, a Diploma of Master studies and a successful entry exam. No alternative entrance and admission is available to accredited programmes of higher education institutions in Hungary. The only exception is the field of short non-degree courses, programmes for adults who want to upgrade their knowledge, skills in special continuing education for lifelong learners, for example in the programmes and courses as part of the university of the third age.⁹ This point clearly underlines the orientation of universities and colleges to widen their Bachelor and Master programmes in part-time and distance formats of education for non-traditional courses, and, moreover, some exceptions show that particular universities and colleges open access and admission to non-traditional adult learners into their adult continuing education programmes or non-degree/non-credit courses also in part-time, evening and distance education, week-end, etc. forms.

Since recognition and validation of prior learning has just taken some early experimental forms in higher education, it is just about to accelerate special admission or entry in its testing phase.

Some universities have already created special partnerships with employers, trade-unions, city/regional councils to promote smart city, creative city programmes, or to join in for the cultural capital programme, like in the case of the City of Pécs for 2010, with open lectures and courses together with both citizens of the municipality and the visitors. Another aspect is to organise summer universities/open lectures, adult learners' weeks according to a major UNESCO initiative from 1997. Eötvös Lóránd University (ELTE), the János Vitéz College of Péter Pázmány University and the Faculty of Adult Education of the University of Pécs have so far participated such actions to promote non-credit courses, lectures and summer

⁸ Act on Hungarian Higher Education - CCIV./2011.

⁹ The Programme of King Sigismund College is identical in this context. List of courses for elder learners is accessible at: <http://www.zskf.hu/nyugdijasok>

universities in such context. This point refers to new and experimental courses for the adult public in order to form partnerships amongst generations, associations and institutions holding special knowledge better be transferred with new ways of co-operation. For example, museums and libraries are becoming special partners for higher education, and, also, industrial organisations are also invited to generate new forms of knowledge transfer on the basis of connecting research, development and innovation.

On the other hand, the typology of Slowley and Schuetze for lifelong learners can be partially and very cautiously applied in the context of Hungarian higher education.¹⁰ In Hungary, a second chance learner is a person who wishes to take or to complete her/his public education in special schools offering second chance programmes. Therefore, the notion is not used in that direct meaning, or to reflect an alternative way of access/admission through special examination or assessment. This would, on the other hand, require a rather sophisticated RPL or VPL system in higher education which is still in experimental and early phase.¹¹ In Hungarian higher education recurrent learners and returners are the majority of lifelong learners, but refreshers and learners in later life are people who expand the number of new learners entering into higher education for gathering either scientific knowledge or practical skills.

4. Background information. Information on important regulatory issues and policies

So far as the regulation of higher education is concerned, it is the Act on Higher education that clearly regulates that only accredited degree programmes can be advertised and be accessible for candidate students within Bachelor, Master and Doctorate levels. The Act also describes the number, forms (universities and colleges) of higher education institutions (state-funded, and private) and defines what makes a higher education institution. The Act demonstrates the process of accreditation of degree/credit programmes at Bachelor, Master and Doctorate (PhD) levels and describes how the state finances state universities, colleges and regulates the forms of financing of studies at higher education institutions. This law regulates participation and defines entry forms and processes to degree and non-degree courses at Hungarian universities and colleges.¹²

Most relevant regulatory issues at national, regional and/or institutional level to stimulate the participation of adults in HE in Hungary (e.g. access and admission to HE, funding of HEIs, student grants/ loans)

A major principle of higher education in Hungary that it is attached to the European Higher Education Area (EHEA), therefore, higher education applies all achievements of the Bologna-process and considers itself as a significant actor in lifelong learning. Another principle is quality education and research, and this issue underlines the necessity of accreditation towards educational activities and the application of relevant quality assurance methods, tools so as to raise effectiveness of research, development and innovation potentials in consideration of partnerships with major stakeholders at national, regional and local levels. Hungarian state universities are active partners of EUA, and it means that most of them apply major principles and goals of EUA statements and charters, for example, the Charter of EUA on lifelong learning.¹³

¹⁰ Slowley, M. – Schuetze, H.G. (eds.) (forthcoming) *Global perspectives on higher education and lifelong learners*.

¹¹ A latest project to focus on the development of validation system in higher education is described as follows (only in Hungarian!): <http://tamop413.ofi.hu/validaciorol>

¹² Act on Hungarian Higher Education - CCIV./2011.

¹³ EUA (2008): *European Universities' Charter on Lifelong Learning*. Brussels: EUA. Source: <http://www.eua.be/eua-work-and-policy-area/eua-policy-position-and-declarations.aspx>

Hungarian higher education is regulated by the Ministry of Human Resources and its State Secretariat for Education.¹⁴ The main goal of the Ministry is to regulate higher education, as part of the educational policy of the Government of Hungary, so as to properly generate and disseminate quality knowledge. This approach is also connected to the Science-policy of the Government so as to help higher education become competitive by paying a significant attention to quality education and research through partnerships with key stakeholders in research-development, and in innovation. The Higher Education policy of the Ministry is to help higher education maintain and develop its education and research activities and services. This policy supports the orientation of candidate students towards all sciences, especially to natural and technical sciences and engineering. This approach is also reflected in the rate of state-funded places for students in higher education. The Government of Hungary supports the freedom of students to decide in which subject area to study, however, the state-funded places are limited to state-interests referring to the scientific area/major. Students can self-finance their studies in case of insistence on a major the state does not fully support according to its policies. The funding system is orientated mainly to support full-time students as part-timers are financing their studies from individual sources in most cases. However, part-timers can also have financial difficulties to cover the costs of their education and training. In that case, a special social support starts to make the student pay his/her fee in monthly instalments and not in one sum. A special state-owned student-loan system is also in operation and that is the only system to officially help students cover the expenses of the studies and pay back the loan in monthly payment.¹⁵

Another important aspect of higher education in Hungary is the Hungarian Rectors' Conference which is a highest platform for university and college leaders to demonstrate a common view and position in each and all issues to influence the status and future development of higher education in the aspect of regulations/law, financing and national development plans and EU-funded/co-funded programmes and initiatives.¹⁶

Participation in Higher Education is formally regulated by the Act on Higher Education, namely, any person who enrolls to a certain university must pass an entrance exam, by holding a certificate of maturation, on the other hand, anyone can decide which major to enrol and choose what available format of education to take (e.g. full-time, part-time, distance or evening teaching). Another route is to take non-degree higher level vocational training, post-graduate specialisation, partial trainings, summer university courses which can also be accessed depending on the current level of education of the person. Such courses and trainings open *flexible learning for adults and imply innovative methodologies and the use a certain VPL and recognition of prior experience in workplace environment*. Please find example for this aspect in the Case Study for Hungary.

The basic principle for degree courses is that they are to be accredited, namely, only accredited programmes/courses can only be advertised to adult learners. They may be accredited by the Hungarian Board of Accreditation (MAB), based on the Act on Higher Education, referring to degree-courses (BA, MA and PhD levels) or through the Adult-Training Accreditation Board (FAT), based on the Act Adult Education. This approach, on the other hand, allows higher education organisations *to provide their accredited courses with flexible provision and methodologies* referring to time (e.g. part-time, evening or distance forms of education) and new ways of knowledge transfer (e.g. e-learning, blended-learning,

¹⁴ Description of the Ministry of Human Resources: <http://www.kormany.hu/en/ministry-of-human-resources/news>

¹⁵ <http://www.diakhitel.hu/index.php/en/10-key-features-of-the-student-loan>

¹⁶ Major Source on Hungarian Rectors' Conference: <http://www.mrk.hu/en/> A short description of Hungarian Higher Education and its institutions is accessible at: http://www.mrk.hu/wp-content/uploads/2011/12/mfi_angol_2012.pdf

m-learning, etc.). Moreover, universities and colleges are autonomous to provide non-accredited non-degree courses in any format they recognise as beneficial to adult learners and, from another angle, they are responding either to current adult learning needs or local/regional stakeholders' claims. There are no other specific laws to regulate this area with any particular orientation and claims.

The existing regulations give way to autonomous universities and colleges to provide flexible learning opportunities through either accredited degree-courses or non-degree courses, or even attend the varieties of informal learning programmes provided by higher education institutions focusing on the dissemination of scientific knowledge or to develop social skills in dominantly community learning formats either within the institution or in extramural environment. A more *specific strategy on adult and lifelong learning would be of social benefit*, on the one hand, to help raising participation, and on the other, to get universities involved into local and regional learning partnerships for better learning performance.

National policies and trends in HE as well as in adult education, vocational education and training to overcome barriers between the sectors (e.g. cooperation between HE and adult education sector and NGOs, strategies for RPL)

A significant policy element and trend, as part of the one-step up orientation, is to urge students to learn for vocations, BA and MA/MSc and Doctorate degrees and gain knowledge, develop competences, and skills which are needed in the labour market. Higher education policy in Hungary has turned towards trying to raise the number of students in higher education, in accordance with the goals of the Education and Training 2020 programme of the European Union, referring to attainment in higher education by 2020.¹⁷ However, demographic trends and the direct involvement of the Government to raise the number of state-funded places of full-time programmes in higher education in natural and technical sciences, engineering, and to radically reduce state-funded places in social sciences, humanities, economics and law will eventually make it difficult to raise the overall number of students in higher education. Additionally, the number of graduating students in higher education fell after 2010 from 38.000 to 35.000 in 2011 (a 6.5% fall).¹⁸

It is seems fairly difficult to overcome barriers amongst sectors of education and training, as most adult education and training programmes are organised in the non-formal sector and consider higher education as a separate actor in the education of adults. Co-operation amongst higher education, vocational education and training and adult education is very rare and mainly demonstrated, within higher education, by departments and/or institutes of adult education/andragogy through their education and training programmes for the development of adult learning and education through the followings:

- accredited education and training of adult educators within Bachelor and Master programmes;
- research and development initiatives, projects in adult learning and education through partnership with major stakeholders, like labour market key actors, employers, chambers of commerce and industry, local councils, labour offices, training centres, adult training enterprises, civic organisations, churches, etc.;
- accredited adult training programmes for adult learners.

Universities having a rather strong adult education/adult training orientation have their own partnerships/consortia with VET and adult education organisations to appear in joint

¹⁷ Source: http://europa.eu/legislation_summaries/education_training_youth/general_framework/ef0016_en.htm

¹⁸ Source: http://www.ksh.hu/docs/eng/xstadat/xstadat_long/h_wdsi001b.html

development or research projects for quality adult learning and education targeted in the national development plan or maintaining partnerships for raising practice-oriented education and training dimensions of their own portfolio.

Since the application of RPL, VPL mechanism is at a very early stage, most Hungarian higher education institutions have no or limited practice in the validation of prior learning, however, the new model for universities will be launched from 2012 and onwards at state-owned universities at least, and this can be regarded as a strategic development. One can find an existing practice of RPL in non-formal initial (iVET) and continuing vocational (CVET) training programmes.¹⁹

Specific conditions/events/policy decisions shaping policy in the field of opening HE to adults (e.g. national policies which specifically mention the openness of HE to adults)

The new Act on Higher Education of 2011 urges for a better higher education developing its educational and training provision to support adult learning, as universities and colleges ought to open for new adult learners' needs in their localities and should develop partnerships with several institutions and organisations of education, culture, enterprises so as to raise joint actions of knowledge transfer by applying new ICT –tools, methods, curricula and identifying new needs of learners, organisations where higher education may play a significant, leading role implementing, developing and expanding quality learning. Such efforts can go along with place management, social capital development, local and regional development programmes, interregional projects, like that of the cross-border partnerships within higher education, local and regional councils, joint ventures, chambers of commerce, etc.²⁰ Basically, one has to acknowledge that the conditions are provided for opening higher education for more adult learners, as, formally, each and all university and college lectures are open for adults to visit. Several universities and colleges organise their own actions by involving people from several age-groups to disseminate their services, their education and training portfolio through various programmes, festivals, projects, web-based contacts, public events, adult learners' weeks, third age university initiatives, city-region festivals, summer universities, etc.

Most universities' and colleges' websites offer several programmes, lectures, training-packages for adult learners at a bargain price or even for free. Universities and colleges are promoters of the dissemination of sciences through open lectures, public speeches in lecture halls combined with broadcasted events, labelled as open university programme.²¹

5. Disadvantaged and underrepresented groups of adult learners in HE

There are some disadvantaged and underrepresented groups of adult learners in higher education in Hungary, like the members of the Roma minority, however, universities and colleges make every efforts to turn their institutions easily accessible for those groups and raise the number of Roma adults to learn and study in various programmes in higher education. Students from social disadvantages families can apply for additional social support from the university and it is a tool to compensate a significant part of social disadvantage. Such students can apply for being accommodated in halls of residence for the time of higher education studies. Also, students with disadvantaged family background can apply for a

¹⁹ Please find examples of the validation of prior learning in Hungarian vocation training centre and second chance school at the Observal project website of EUCEN (European Universities Lifelong Learning Network): http://www.observal.org/country_profiles/hungary and <http://www.observal-net.eu/node/50>

²⁰ Please find the example of Cross-border development programme for Hungary and Croatia with university participation and partnership-based educational, development and research orientation in the intercommunity human resource development dimension: <http://www.hu-hr-ipa.com/en/funded-projects>

²¹ The example of the Open University Programme of the University of Pécs is available at: <http://www.nyitottegyetem.pte.hu/> Another good example for open university programme in the media is the „University of all Knowledge/Mindentudás egyetem”: <http://mindentudas.hu/>

reduction of any occurring tuition fees or to state-funds in order to cover a proportion of or the total of their tuition fee. This approach applies to part-time students as well!

6. *Successful policies in regard to opening higher education to adults*

An analytical approach must underline that successful policies for opening higher education to adults are to cover up and measure the learning needs of adults and their own communities in the localities of the higher education institutions. Therefore, policies, missions of universities and colleges must focus on needs-oriented programmes as part of their education and training provisions. Also, universities and colleges are to demonstrate and maintain open access to several forms of scientific lectures, programmes and organize new forms of knowledge and data-bases where adult learners can decide which programme or service to take through a more formalised way. Higher education institutions may not consider themselves as places for adult learning, as they are, and not necessarily understand or rather slowly move in the direction of what makes an university a place for lifelong learning. The Hungarian Universities' Lifelong Learning Network (MELLearn) and its actions, annual conferences help universities and colleges to explore their potentials how to expand their education and training provision towards adult learners.²²

A significant dimension of a successful policy is how an institution can become learner-centred, can turn to become a lifelong learning university. That means a new conception of organising the university/college into a flexible learning space where the organisation itself learns how to fulfil its missions in open and flexible ways through quality mechanisms and actions with a thorough monitoring of all actions and functions directly connected with education and training.

7. *Important measures that have been initiated to increase openness of HE*

Some initiated measures for widening the openness of higher education in Hungary are widening access to courses in part-time, open-distance and evening course formats for adult learners, establishing and developing new distance/e-learning programmes of non-degree programmes for adult learners, introducing and developing new higher vocational training programmes for adult learners and increasing new and effective methodologies of teaching and assessment. Universities and colleges have widened their collaboration with local and regional stakeholders, NGOs, etc. to collect some peculiar feedback upon which dimension and direction to expand provision and services in order to attain more learners from the local public. Therefore, institutions and organisations of adult education and training were also asked to give advice on how to increase openness of HEIs. One specific aspect has been the website-based virtual openness of the institution, and another has been the capability of recognising the corporate role of the university to respond effectively to local needs of adults, with new learning spaces, methods, contents amongst those needs.²³

Finally, universities and colleges have had to turn their physical infrastructures as open learning spaces to adult learners and demonstrate an open and partner mood of mutual actions and communication so as to get rid of the unsuccessful mood of the academia by closing science into an ivory tower of academic cycles and, instead, disseminate quality knowledge, based on research, to the public through several open ways by, for example, the “night of researchers” which brings research and science closer to adult learners interested in human reasoning and mind-set.

²² MELLearn website demonstrates, through conferences and publications, the policy orientation of higher education towards adult learning and opening up to adult learners with quality services, accessible tools and effective methods. Source: <http://www.mellearn.hu>

²³ Please find more on corporate roles of universities at Jarvis: Jarvis, P. (2001): *Universities and Corporate Universities*. London: Kogan Page

8. Information about statistical data sources on adults in higher education. Most relevant statistical sources to collect information on the participation and situation of adult learners in HE in Hungary

One statistical source for participation in higher education in Hungary is the comparative tables of Eurostat on tertiary education in Europe.²⁴ However, a more detailed survey is available in the statistical tables of the Central Statistical Office (KSH) of Hungary. The rate of adult learners in higher education is not directly measured, one has to calculate it for 2011-12 from the statistical tables of the Central Statistical Office (KSH) for tertiary education, in an advanced and detailed tables.²⁵

Key data to summarize the situation of adults in higher education are available (e.g. quantitative analyses on participation rates; socio-demographic features of participants, study motives/ objectives; modes of study; completion/ drop-out)

By taking away the number of full-time students, which was 241.614, from the overall figure of 359.824 in the 69 higher education institutions, we will receive 118.210 students as adult learners who studied in higher education other than full-time format from higher vocational programmes to doctorate degree programmes. This quantitative table on times series of annual data shows the number of students enrolled into higher education/tertiary education since 1990 and onwards (Table 2.6.9.) It is rather easy to collect the figures for such adult learners based on the Tables on Tertiary Education of the Central Statistical Office:²⁶

Academic Year	Number of higher education institutions	Total number of adults in Tertiary Education (learning in formats other than full-time programmes)
2006/06	71	177.674
2007/08	71	154.811
2008/09	70	138.105
2009/10	69	127.630
2010/11	69	120.620
2011/12	68	118.210

It is rather difficult to measure adults' learning at universities and colleges other than higher vocational training, bachelor and master degree majors, unified/undivided majors, postgraduate specialization and doctorate degree (PhD/DLA) studies. One must recognise that several universities and colleges organise other forms of adult trainings for non-traditional groups in the context of upgrading labour market and lifelong learning oriented key competencies. Unfortunately, the number of adults participating such courses are not listed and collected in any statistics to expand those previous figures indicated in regular courses of universities and colleges. This issue underlines the need for a better-planned and structured monitoring of adults in lifelong learning in higher education institutions.

Also, the socio-demographic features of the participants are generally not described other than rate of male and female students enrolled to higher education. Another Table (Education – 2.5.) describes the number for students graduating at any level of education, and the column for Tertiary Education shows the overall figures for 1960 and onwards, and in case the number of students graduated in full-time programmes is taken away from the overall

²⁴ Source: http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Tertiary_education_statistics

²⁵ Source: <http://www.ksh.hu/education>

²⁶ Source: http://www.ksh.hu/docs/eng/xstadat/xstadat_annual/i_zoi007a.html

figures for certain years, one will get the results for adult learners graduating.²⁷ The following table will summarize those figures for the 2006-2012 period:

Year	Number of adult learners graduating from Tertiary education (Thousands)
2005	24
2006	23
2007	22
2008	20
2009	17
2010	15
2011	13

The Hungarian Universities Lifelong Learning Network (MELLearn) made a special survey on adult training activities of the 16 state-owned universities in 2006 (2 of them did not send back the MELLearn-questionnaire). The survey listed special categories of adult training activities of higher education institutions as part-time degree courses, evening degree courses, State-listed (OKJ) labour market trainings, continuing professional trainings, language courses, and other forms. A special “Table of figures of participation in university adult trainings” indicated the following figures for 2006:²⁸

Format of education and training for adults in higher education (at 14 state owned universities)	Number of adult learners to enrol to such programmes (2006)
part-time degree courses	33.671
evening degree courses	1.141
State-listed certified trainings (OKJ-trainings)	3.364
Continuing professional trainings	2.479
language courses	3.347
other forms of trainings	4.442
	total: 48.444

One has to conclude that the number of adults learning in higher education is continuously falling in regular forms, however, it is growing in non-regular/non-degree forms of education and training at several universities.

The so-called OSAP on-line statistics of the National Labour Office/Nemzeti Foglalkoztatási Hivatal/ provides a detailed statistical database on adult learners, accredited organisations, training firms and institutions which provide adult education. Also, this data-source imply several data on various kinds of accredited training courses, post-graduate courses, special trainings for upgrading basic skills of adult learners, etc. Unfortunately, this database is available in Hungarian language only!²⁹

²⁷Source: http://www.ksh.hu/docs/eng/xstadat/xstadat_long/h_wdsi001b.html

²⁸ MELLearn Survey on the adult training competences in higher education. Survey for 2006. Debrecen: MELLearn. P. 3.

²⁹ Source: <https://statisztika.nive.hu/>

Another English language source of data on recent part-time education, recognised as trainings for adults,³⁰ is the Statistical Yearbook of Education of the Govt. of Hungary for the year of 2010-11.³¹ The OECD also provides its compilation as Education at Glance which enables one to get comparative data on higher education referring to students/adult learners learning part-time at universities of the OECD member states.³²

9. Lack of data sources concerning the situation of adults in HE

It is necessary to initiate and worth expanding such surveys to private universities as well in order to reach for a rather obvious figure of adults' lifelong learning in higher education in Hungary. One may remark that the Central Statistical Office ought to design and implement a rather more accurate survey in order to make the lifelong learning benchmark for Hungary reflect a more realistic picture. That is why one may easily question the current figures of lifelong learning for Hungary and for other Central-East European countries in the overall comparative EU/Eurostat surveys. The above listed and indicated figures underline a matter of the *severe lack of accessible data sources and statistical surveys/figures referring to adults participating higher education* based programmes in order to widen their knowledge through non-degree courses. Data referring to special non-accredited adult training programmes (OkJ), language courses, evening courses, non-degree distance and e-learning courses are difficult to obtain data about. Generally noting, one may come to a difficult situation when trying to describe peculiar adult education and training programmes and aims to connect those programmes to participation rates which may be generally missing for several universities and colleges as they have forgotten of making statistics of their own trainings for adult learners. Therefore, it is very difficult to estimate or even to measure adult learners in higher education as the figures which are easily accessible are the figures to show up and reflect adult learners engaged in formal learning at universities and colleges. Non-formal learning activities are, in most cases and dimensions, not connected to regular statistical data collection. This ought to be one conclusion that the HEAD survey reflects back upon as a key recommendation for the responsible Ministry and the Central Statistical Office (KSH) to expand statistics focusing on university lifelong learning. The Hungarian Universities' Lifelong Learning Network (MELLearN) could be a good source of managing the collection and evaluation of such data referring to adult learners' participation in higher education.

10. Information on developments and implementation regarding opening HE to adults at different levels. The most important historical background with regard to opening HE to adults

There are several identical historical conditions and developments in Hungary which are of importance to the opening higher education to adults. The democratization of higher education started in 1945, however, early attempts of late nineteenth and twentieth centuries marked a rather liberal attitude to make universities follow the modern English opening of higher education to the adult public through *university extension*. Those attempts could not break through towards explicit realisation of such an initiative, and no significant political and scientific support backed this rather liberal approach after World War I, but, on the contrary,

³⁰ Polónyi, I. (2012): Adult Education in Higher Education/Felnőttképzés a Felsőoktatásban. In. Németh, B. (2012) (ed.) Andragógia kutatások és fejlesztések /Adult Education Research and Development. Pécs: PTE FEEK. Pp. 282-291.

³¹ Source: <http://www.kormany.hu/download/4/45/50000/Oktat%C3%A1si%20%C3%89vk%C3%B6nyv-2010.pdf>

³² Source: <http://www.oecd.org> – Education at Glance, comparative data source

higher education became dominantly attainable to students from middle-class family-background.³³

A more modern and democratic reconstruction of higher education came into ground after 1945, yet, the Communist take-over and hegemony did not help the evolution of an autonomous set of institutions to develop. It was only after the mid-1960s that a slow liberalisation and democratization entered into public and higher education. Even if evening-courses started already in 1945, it took two decades that university and college life could get rid of a rigid heavy ideological constraint and slowly turn towards modern development with growing part-time and evening courses formats in education through universities and colleges. The late 1970s and 1980s were to establish a good environment for educational and scientific reforms so as to continue quality scientific research and combine it with opening higher education to non-traditional groups of students and adult learners at the turn of the communist regime into liberal democracy in 1989-90.

1990, higher education in Hungary has gained a strong autonomy to plan, develop its educational, training and research programmes in co-operation with several stakeholders.

11. Actors and stakeholders to have been involved at national level to support the opening of HE to adults

In the last two decades a new system of higher education has been formed, therefore, more than sixty universities and colleges provide accredited courses for students all around the country, of which 19 universities and 9 colleges are state-owned institutions. There seven other private universities and 32 private colleges too. Most state-owned universities and colleges have created well-organised partnerships with major local and regional stakeholders in order to promote quality education and training programmes, and moreover, research and innovation projects with European co-financing through several funds administered by the European Commission. In 1999, the Bologna-process was introduced in Hungary as a systemic change of higher education in order to become a successful member of the European Higher Education Area in the peculiar Lisbon-process. Local councils, chambers of commerce and industry, main employers/industrial firms, NGOs have become close allies and partners of higher education and called attention of universities and colleges to the need for developing human resource development, adult education and training, skills upgrading and the improvements of key competences of both lifelong learning and those of the labour market. That is an identical reason why universities and colleges have started to open to adult learners, which has been effectively promoted by the Memorandum on Lifelong Learning and by the Lisbon Agenda to connect quality education and training with higher education programmes in flexible formats and methodology attached to quality content.

12. Programmes at regional level to attract adult learners in HE and their added value

There are not enough specific programmes at regional level to attract adult learners in higher education other than the programmes of the universities and colleges offering courses to adult learners to both adult students and adult learners. Their added value is the flexible way that adult learners can learn from them as they are accessible through either correspondence, evening or distance/le-education modes of delivery.

³³ Please find a brief history of Hungarian higher education at:
http://www.nefmi.gov.hu/letolt/english/highereducation2_1.pdf

13. Certain monitoring mechanisms at national, regional and/or institutional level regarding the development of participation of adults in HE

Adult education and training programmes of higher education institutions are regulated by the Act of Adult Education. This Act enables that the educational programmes/curricula, delivered to adults, ought to be accredited, therefore, most programmes for adult learners provided by universities and colleges have been accredited and this accreditation provides a higher level of social recognition for the providing institutions. Another way of monitoring is a the way how adult learners think of the programmes provided by universities and colleges as part of their adult education and training services.

14. Résumé and outlook. The focus of existing evaluations on measures to increase openness and participation of adults in HE and structural changes initiated by these measures (e.g. monitoring mechanism for participation of adults in HE)

Existing statistical monitoring of the Central Statistical Office (KSH) only focuses on the number of adults who enrol to higher vocational trainings, Bachelor, Master and Doctorate programmes, post-graduate specialisation, however, direct monitoring and evaluation of programmes exist only at institutional level. The only exception is the MELLearn organisation and the Adult Education/Andragogy Sub-Committee of the Hungarian Academy of Sciences which have generated some irregular national and regional comparative evaluations of universities and colleges to participate in adult education through their programmes.

It means that, recent higher education oriented researches of the National Institute of Educational Research and Development (OFI) have dominantly concentrated on the quality development of Hungarian higher education referring to creating the necessary environment for joining the European Higher Education Area and, at the same time, to develop necessary tools for higher education in order to fulfil its new functions, like that of the introduction of new VPL system by 2015.³⁴

15. The influence of the Bologna process, Lisbon strategy, Copenhagen process etc. on the enhancement of adult learners in HE in Hungary

The Bologna-process has not had direct impact on adult learning in higher education other than the separation of bachelor and master degree majors helped many young adults to return for a higher master degree after collecting a significant work experience in relation to their first degree. Also, the Bologna-process has generated a rather floating shift of students from one scientific area to another to develop and raise scientific knowledge according to the concrete needs of the learner or/and, for example, of her/his employer. The Lisbon Strategy opened up the debate over lifelong learning and helped higher education institutions to demonstrate their capacities and actual steps towards becoming institutions of lifelong learning for raising employment and active citizenship in their localities. The Copenhagen-process has generated a more quality and performance-centred thinking to get strengthened within HEIs by starting to apply more quality mechanisms as CQAF and other quality assurance methods (e.g. ISO 9001). The Faculty of Adult Education and HRD of the University of Pécs was the first HEI in Hungary to introduce the ISO system for monitoring processes of educational administration.³⁵

³⁴ The VPL model for Hungarian HE was developed through a project called TAMOP (Social Renewal Operative Programme) 4.1.3 – Source: <http://www.ofi.hu>

³⁵ Jakab, T. – Németh, B. (2006): Problems of Transformation of Existing ISO 9001: 1994 Quality Standard into 9001:2000 Quality Standard at a Higher Education Institution in Hungary. Case Study 9.3 In: Urponen, H. –

One must mention the peculiar example of the Faculty of Adult Education and HRD of the University of Pécs which developed and initiated the Bologna-structured education of adult educators both at BA and MA levels which started after 2006. The main goal was to improve the professional development and character of adult educators/trainers in Hungary and, also, to provide relevant research and development programmes focusing on adult learning and education from the position of higher education. This example and special delivery of adult education related knowledge in a social science orientation was shown as a best practice within higher education management.³⁶

16. General assessment of the situation of adult learners in HE in Hungary (e.g. development of the discussion over the last years, perspectives)

The researcher of the subject matter of HEAD, in the context of Hungary, must generally note that the situation of adult learners in higher education in Hungary is fairly complex. It mainly depends on social, economic/labour market status, and also, on former learning experience of the adult and his close family – social environment which may urge or constrain further engagement in education through flexible programmes. In many cases, flexible programmes require basic ICT knowledge and the status of regular ICT user with minimal hardware/communication capacities. Unfortunately, there are a lot of adults, young adults outside the big regional municipalities who are simply pulled back from choices of entering HE for their bad social statutes, as prisoners of growing poverty. For those who are in good and stable social environment, participating higher education will definitely be a tool of mobility.

17. Main particularities of Hungary in comparison with other countries (e.g. special characteristics of modes of study; exceptional features of adult HE)

One must recognise that there is not too much difference in the modes of studies in comparison with other Central-East European countries, however, one exceptional feature is the relatively low number of private universities and colleges (in comparison with Poland), and the limited educational policy orientation towards university lifelong learning, other than some individual university initiatives, and the positive impact of European projects funded by the European Commission.³⁷

18. An open research questions still apparent for analysis

A very significant research question became apparent: What the methods and tools of implementing a complex monitoring of adult learning in Hungarian higher education are needed today?

Mitchell, V. – Rutkauskienė, D. – Mark, R. – Moe, F. – Brennan, M. (eds.) (2006) *The Managers' Handbook for European University Lifelong Learning*. Kaunas: ISM-University of Management and Economics. Pp. 202-203.

³⁶ Davies, P. – Németh, B. – Pausits, A. (2010): Development and Management of University Lifelong Learning. In. Huisman, J. – Pausits, A. (2010) (eds.) *Higher Education Management and Development*. Münster: Waxmann. Pp. 147-159.

³⁷ Source: Tempus Public Foundation – http://english.tpf.hu/pages/content/index.php?page_id=22;
http://english.tpf.hu/pages/content/index.php?page_id=14

CONFINTEA VI follow up and role of university lifelong learning: Some issues for European Higher Education¹

Abstract

The Belém Framework for Action of CONFINTEA VI underlines, amongst many other issues, the theme of quality in adult learning and education which must be holistic and multidimensional both as a concept and a practice through various tools, like the partnership with higher education institutions. Bridging adult and higher education is difficult, but the lifelong learning paradigm may help European universities doing so.

This paper will argue that European Higher education should, on the one hand, educate adults to be qualified for their complex roles in the society and the economy either through their own academic programmes or in other non-formal ways. On the other hand, higher education should promote quality research on adult learning and education and develop active citizenship too. An emphasis on the former task was clearly underlined in the Budapest declaration/Comminigüé on 4th December, 2008. as part of the European preparatory process for CONFINTEA VI, and the latter has been articulated by the UNESCO for more than a decade.

A balanced position, I think, may help universities build themselves as better and more effective learning organisations.

1. The historic aspect: early attempts of UNESCO to involve universities in developing adult education and their impacts on current trends: new song with old lyrics?

It was in 1968 when Philip Coombs came up with his argument upon the crisis of education which, amongst many other challenges of that time, brought about new approaches to education and learning and started new ways of looking on lifelong education to result in a more learner centred framework of lifelong learning. But it also meant primarily that education, and higher education as part of the system, was too slow to respond to social and economic demands and was not flexible enough to recognise new roles and tools to help non-traditional learners in their learning.² The debate which started in and after 1968 accelerated discussions over the importance of the development of non-formal education and, also, around the role of education itself. Of course, it was UNESCO that tried to channel debates and discussions over education, lifelong education with a rather society-focused way, and opposite to the OECD and other economic organisations, to make use of the expansion of adult learning and education through from a humanistic position.

Not only the CONFINTEA III in Tokyo,³ but also the famous Nairobi Recommendation of 1976 indicated that higher education ought to take a key role in the development of adult and lifelong learning and in setting co-operative research programmes in various aspects of adult education in the member states together with adult education and research bodies through an interdisciplinary dimension.⁴

The Nairobi-document, I consider, supported the emergence of a paradigm-shift to balance the market-oriented aspects of higher education roles with rather humanistic ones, for example, in the field of adult education. In the same year of the Nairobi UNESCO General Conference, Dave⁵ pointed out that the three main directions in the development of lifelong education would be *expansion, innovation and integration*. All those three segments of lifelong education, I think, correlates with that of the 40th point of the Nairobi Recommendation of the UNESCO calling the member states to encourage schools, vocational education and training institutions, colleges and universities to consider adult education programmes as a part of their activities, and to participate adult learning and education actions

¹ This paper was written in March 2010

² Coombs, 1968

³ UNESCO, 1994

⁴ UNESCO, 1976

⁵ Dave, 1976

of other organisations mainly by the involvement of their teaching, training and research staff to promote quality services, better access and scientific orientation.⁶

2. The shift from university continuing education to university lifelong learning

I think it is necessary to examine the background of how the changing social, political and economic environment for higher education brought about complex policies and promoted traditional approaches of lifelong education to integrate into the lifelong learning paradigm so as to support a rather learner-centred model for education and learning. Even if the educational models and implications of lifelong learning have been rather economy-focused and have mainly been used by the OECD for almost two decades after 1973, the European environment has helped, since 1991-92, to have a systematic combination of UNESCO promoted, rather humanistic approach for lifelong education and learning, especially in the sense of the Faure-report and, of the OECD-represented economy and market-orientation. The former stressed the community-centeredness of learning and education, the later envisaged a rather learner-centred vision. Now, I think that it became peculiar for the European environment to give a chance to the combination of the two approaches in an outstanding way of Jacques Delors who implemented that combination in his famous report for the UNESCO as *Learning: A Treasure within*.⁷

I think that the context of university continuing education was rather capable of being misunderstood, especially in those countries where the notion has never meant too much or adult and continuing, from another angle, has never been able to modify traditional academic understanding of higher education and resistance towards university-based adult and continuing education except for peculiar courses and lectures to disseminate scientific knowledge for the public.

The 1990s reflected a special phase for university continuing education (UCE) in international higher education environment to collect relevant examples and best practices of higher education-oriented adult continuing education and, at the same time, examples of efficient university structures referring both to institutional changes towards management, education and research. In the European environment, the community efforts to promote quality education and training, efficient access and equal opportunities and partnership-building have reached higher education and adult and lifelong education at the same time with an influence to shift from education towards learning in a constant process. It has resulted in various UCE actions to enable universities create close and regular links between academic staff and practising members of their profession and update their teaching to full-time students to reflect the current attitudes of their professions and, at the same time, to attract funds for research or development work creating greater freedom for action. In some other universities it has helped to fill the increasing number of student places being offered. However, the most apparent impact has been enabling universities to play a significant role in their regions' economic and social development and meet their obligations to make available state-of-the-art knowledge to all parts of society.⁸ A clear danger for higher education has been staying intact and opposing any real change required by the outside world, which later was strongly challenged by the *Memorandum of Lifelong Learning*:

“Most of what our education and training systems offer is still organised and taught as if the traditional ways of planning and organising one’s life had not changed for at least half a century.”⁹

⁶ UNESCO, 1976

⁷ Delors, 1996

⁸ Becher, 1993

⁹ EC, 2000

But it was still in the second half of the 1990s, when the UNESCO in Hamburg, Germany stated in its very well-known *Agenda for the Future* of CONFINTEA V. that:

“ We commit ourselves to: 19. Opening schools, colleges and *universities* to adult learners:

(c) by establishing joint university/community research and training partnerships and by bringing the services of universities to outside groups;

(f) by providing systematic continuing education for adult educators;

(g) by calling upon the World Conference on Higher Education (Paris, 1998) to promote the transformation of post-secondary institutions into lifelong learning institutions and to define role of universities accordingly.”¹⁰

The overall aims of the *Agenda for the Future* of CONFINTEA V. became very influential and together with the respected *Hamburg-declaration* of the same event strongly supported a learner-centred approach and gave way to adult and lifelong learning to serve as a new paradigm both for adult and continuing education and for higher education! It became also obvious that higher education had to signal new tasks in the frame of lifelong learning. Some distinguished scholars of CONFINTEA V. went on to formulate a new debate over higher education and lifelong learning by indicating institutions of higher education aiming to understand and consider new roles for universities in a changing time preparing for the Millennium in the year of 2000. Therefore, the UNESCO, together with respected university-based adult educators, scholars and specialists in the field of lifelong learning, together with NGO representatives, organised a conference into Mumbai, India, when preparing for the World Conference on Higher Education in Paris, for a debate over the issue and a statement followed and concluded the discussions named as the Mumbai Statement.

The Mumbai Statement recalled the words of the *Hamburg Declaration*, considered the relevant points of the *Agenda for the Future* stated that global trends affect higher education and other institutions of higher education which struggle to cope with new opportunities and demands. The Statement indicated that higher education institutions will have to play new roles in the perspective of lifelong learning.¹¹ The imperatives of education, the Statement pointed out, throughout life are driven by diverse demands of global economy and those of equitable and sustainable societies. Therefore, the Mumbai Statement recognized that:

“(2) Lifelong learning has become a key concept in the thinking about education and training worldwide.

(3) We see a key purpose of lifelong learning as democratic citizenship, recognizing that democratic citizenship depends on such factors as effective economic development, attention to the least powerful in our societies, and on the impact of industrial processes on the caring capacity of our common home, the planet.....

(5) Lifelong learning is about the interaction between learners, educators, and diverse knowledge. The long tradition in adult education of supporting learning opportunities for the excluded groups of women and men in our societies draws attention to the rich and different ways of knowing and representing knowledge within our societies. ***As the construction , understanding and sharing of knowledge is the most fundamental purpose of universities and other institutions of higher education, so a full understanding of lifelong learning calls on us to examine many of our assumptions about what is taught and why.***

¹⁰ UNESCO, 1997

¹¹ International Journal of Lifelong Education, 1998

(8) Changes and adjustment to academic life implied within lifelong learning include such practices as flexible and responsive systems of access, delivery, curricula, and accreditation which take adult learners' backgrounds, daily schedules, prior learning and life contexts into account. Counselling and guidance, for instance, may need to be available at later hours or in community-based settings for ease of access. The education of university level professionals needs to be rethought, taking into account initial university education and continuing learning throughout life. Importantly, the faculty and administrative staff of institutions of higher education need support and personal development opportunities in the light of changes due to the implementation of lifelong learning.

(9) The transformation to genuine lifelong learning institutions require a holistic approach which

(a) supports the institution becoming a lifelong learning community itself;

(b) integrates academic, financial and administrative elements;

(c) provides structures which are responsible for organisational, staff, student and curriculum development and community engagement; and

(d) aligns the various supportive structures such as academic information systems, library provisions and learning technologies to the new mission of universities in learning societies.”¹²

The Mumbai Statement moved forward the debate and discussions over university lifelong learning and also helped the European cycles of university adult and lifelong education and learning to promote such implications with the Memorandum-debate over lifelong learning and the new contexts of the Bologna-process, the former to demonstrate a wide-range discussion in Europe over lifelong learning and its key messages and the later to frame the tasks of a reconstructed European higher education preparing for quality centred changes both in education and research. However, the Mumbai Statement reflected the implications of the lifelong learning paradigm in structural changes within in institutions of higher education in order to prepare for lifelong learning action/service for various learners, regardless of age, sex, nationality, etc.

The Mumbai Statement was, in the context of the UNESCO, followed by the famous Cape Town Statement of a further debate after Mumbai at the University of Western Cape, South Africa in October 2000.

The Cape Town Statement moved further with the familiar issues of lifelong learning and connected higher education, lifelong learning to active citizenship and it called for characteristic elements of a lifelong learning higher education institution. The following six such elements were outlined by participants of the Cape Town Conference discussing the characteristics elements of a lifelong learning higher education institutions:

(1) Overarching frameworks which provide the contexts facilitating an higher education institution to operate as a lifelong learning institution. These are: regulatory, financial and Cultural/social;

(2) Strategic partnerships and linkages – to include the following. forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups in society;

(3) Research is understood in a broad sense and includes working across disciplines and/or across institutions. Lifelong learning is regarded as an important and legitimate research area;

¹² UNESCO, 1997

- (4) **Teaching and learning processes** – Educators encourage self-directed learning, engage with knowledge, interests and life-situations which learners bring to their education and use open and resource based learning approaches;
- (5) **Administration policies and mechanism** – service to learners is top priority of the administration;
- (6) **Student support system and services** – Learners are supported to become independent learners in various ways. ¹³

I want to stress that the Cape Town Statement generated further debates over university lifelong learning (ULLL) and such debates over ULLL was promoted by EUCEN in various programmes like CEPROFS at the University of Mulhouse in 2001 and onwards.

3. *The role of citizenship and active citizenship*

I do think that another dimension of university lifelong learning is the promotion of active citizenship. According to Baert, there is no single definition of active citizenship (Baert, 2003) and that active citizenship is an open-ended process. Another essential distinction is that education and higher education is important in learning citizenship and to help building collective and multiple identities. Therefore, higher education helps “to facilitate the *critical interrogation* of dominant cultural codes and symbols in order to help finding connections between power and culture, to encourage the *exploration* of cultural perspectives and codes embedded in *different meanings*, values and views, and *personalizing the political so as to deconstructing* dominant codes of information by discovering personal experiences of learning citizenship.”¹⁴

Johnston, however, pointed out that we can learn about citizenship when learning is about citizenship as *status*, but we can also learn through citizenship, when we reflect on *experiences(practice)* of *individual and collective citizenship*. Also, we can learn for citizenship and that is *Active citizenship* (Johnston, 2005). In case we share such a model of learning combined with citizenship, we ought to consider that citizenship is generally related to rights (civil, political and social) and participation. On the other hand, according to Baert, **active citizenship is about conscious practice of rights and recognition of status**. It means that the challenge is to redefine democratic citizenship, and social responsibility which are at risk. Eventually, we have to balance between individual freedom and collective interest, and that is a role of participatory competencies.¹⁵

I agree with Longworth as he argued that “encouraging active citizenship means that celebrating learning is connected with active citizenship by individuals, families organizations and communities.”¹⁶ Therefore, it is not at all surprising that he connected active citizenship and the development of learning cities and regions: „One of the most important indicators of successful learning cities and regions is the extent to which their citizens participate in active citizenship programmes that enhance community living, learning and social cohesion.”¹⁷ I think that higher education and related university lifelong learning has got a lot to promote such city-region development through adult and lifelong learning and education.

Also, Jarvis pointed out in his famous Helsinki-speech in September 2000 that lifelong learning was a key factor in raising socially essential forms of capital, namely, social capital based on ‘value-rationality’ through the development of human resources, strengthening and

¹³ UNESCO, 2001

¹⁴ Jansen, 2003

¹⁵ Baert, 2003

¹⁶ Longworth, 2006

¹⁷ *ibid*, p 153

developing learning competences and skills.¹⁸ In 2004, Jarvis underlined the importance of the issue of active citizenship as an integral part of the European lifelong learning policy¹⁹ and, at the same time, he argued that „**citizenship is now a responsibility rather than a right** and,... **there is still a fundamental conceptual difference between citizenship and active citizenship – the one about rights and the other about the exercise of responsibility.**”²⁰

He reflected upon the emergence and spread of the model of the *knowledge-based society* too, which, he claimed, had played a key role together with a harsh constraint of global economic crisis in Europe’s orientation to education and training, learning be renewed so as to promote growth, competitiveness and employability through combined actions and responsibilities of member states and citizens within them. Jarvis clearly indicated that the *Memorandum* (EC, 2000) gave a clear signal that the responsible citizen of the society is active (employed!) and takes actions in solving the problems of his environment. The role of education and training is, he concluded, to form the individual becoming both an employable and active citizen of his community.²¹

Higher education also joined the discussion over lifelong learning with a more intensive involvement through EUA (the European University Association)²² and, also, through EUCEN (the European Universities Lifelong Learning Network) after 2002 as part of the well-known Bologna-process. A significant number of academic researchers indicated, from that time onwards, that a new and systemic framework has been under construction in education and training which aims to generate more quality, partnership-based development, and the dissemination of knowledge through ICT-based tools.²³ On the other hand, EUCEN was the strong promoter of finding tools and methods of more flexible higher education when implementing the Bologna-reforms. This approach was reflected and embedded into the BEFLEX project of the network around 2007 and 2008 to underline the importance of shaping and developing university lifelong learning. The BEFLEX project highlighted the necessity of lifelong learning policies of universities in depth and details which was mirrored by the EUA Charter on Lifelong Learning in the early Fall of 2008 and the Leuven Communiqué of Ministers in 2009. This later document gave a detailed description, within policy environment, what universities ought to demonstrate when trying to realise a new society trying to promote lifelong learning.²⁴ The Communiqué vehemently urged for a new and innovative approach that higher education should help lifelong learning be realised by such concrete affairs as better accessibility, better quality of provision and transparent flow of information in order to raise the level of qualifications, levels of skills and competences of people living in Europe. Universities could help that process by engaging in offering flexible learning paths as part-time and work-based forms. Higher Education institutions should foster more concrete forms of collaborative actions with major stakeholders, like employers, chambers, etc., mentioned beforehand in the EUA Charter, so as to promote better learning performance and, at the same time, helping recognising prior learning. This kind of approach requires genuine ways of tools of funding and structures of provision, and, holistic policies for action in national contexts. The National Qualifications Frameworks, on the other hand,

¹⁸ Jarvis, 2001c

¹⁹ Jarvis, 2004

²⁰ *ibid*, p 12

²¹ *ibid*, p 14

²² EUA Trends-reports and its Charter on Lifelong Learning: <http://www.eua.be>

²³ Field, 2007

²⁴ The Bologna Process 2020 - The European Higher Education Area in the new decade. Communiqué of the Conference of European Ministers Responsible for Higher Education, Leuven and Louvain-la-Neuve, 28-29 April 2009. p. 3. Source: <http://www.ond.vlaanderen.be/hogeronderwijs/bologna/conference/index.htm>

should involve a more practical involvement of higher education as steps towards realising those policies and actions.

Accordingly, this may encourage not only dialogue amongst stakeholders in the sector of education and, for example, those of the labour market, culture, sport, environment, health, etc.(referring to the issue of separation-integration), but the implementation of flexible services for learners as adults with different ages and to incorporate lifelong and lifewide learning through their educational provision for learners. Such changes and new approaches of universities' management may help a social inclusion to get strengthened in order to widen participation and to open higher education to non-traditional learners.²⁵

4. *The impact of the European Preparatory Conference for CONFINTEA VI (Budapest, 2008) and of Belém Framework for Action (Belém, 2009). Promoting a stronger position for higher education*

It is worth recognising, that the 1970s was rather similar to our present era when the UNESCO is still trying to combine the development and expansion of adult and lifelong learning with higher education for the quality development of learning by the promotion of better training, skills, conditions for employment and professionalization of adult educators as it is reflected at Point 16. in the *Belém Framework for Action*²⁶

In order to construct a valuable position for higher education through university lifelong learning and quality education, we must reconstruct the process of how UNESCO came to such conclusions about the role of higher education institutions they themselves had not seen as highly favoured direction for the academic community.

We also have to consider that the commonality in between the 1970s and the period after 2000 is that higher education and adult education have found themselves on the same road signalling the need to prepare for the challenges of the evolving knowledge society in an information and global economy. I do share the position of Jarvis who, by scrutinising universities as institutions of lifelong learning, concluded, referring to socio-economic changes to challenge educational structures, that both adult education and universities are being constrained to change in order to respond to globalisation and the pressures of knowledge societies, whereas this would be apparently difficult for higher education institutions having taught traditionally discipline-based knowledge and whose main clientele has been from young adults. Therefore, he argued that new demands for continuing education for adults are coming from a knowledge-based workforce and that universities are being forced to become institutions of lifelong learning with greater proportion of adult students than young adult undergraduates.²⁷ On the other hand, this issue reflects the mere challenge of an ageing population in the north in global terms and the rising problem how to make higher education prepared for educating a majority of students as part-time students or learners wanting to learn in their localities in different formats which universities are partners in.

Such reasoning may take one to the position to think that current statements and charters on lifelong learning by higher education institutions are obvious recognition of those tendencies. Jarvis and other researchers dealing with the role of universities, like Duke, indicated that lifelong learning will remain a strong and valid concept as important for the evolution of higher education in the changing context of globalization so as to push universities becoming learning organisations by representing openness, local and regional partnerships, networking, etc.²⁸ These approaches indicate the changing status, forms of knowledge, the nature of research, methods of delivery of programmes, roles of the academic,

²⁵ Please find more on BEFLEX and related recommendations at: <http://www.eucen.eu>

²⁶ UNESCO, 2009

²⁷ Jarvis, 2001a

²⁸ Duke, 2000

whilst not only the academic staff, but also the users of academic knowledge find it difficult to understand or to be understood at the university environment.²⁹

A very obvious point of this situation, for example, is the challenge of accreditation or validation or prior learning of adults, which is a real challenge for many universities, especially in those countries where academic communities consider such issues as a threat to the quality of education causing rather complicated and paradox cases of understanding and recognising knowledge.

This issue may take us to power and rule, however, the UNESCO had to recognise through the 1970s and 1980s that higher education in countries of lower capacities, practice and tradition of non-formal and informal learning, recognised by the majority of the society, did not favour new roles to deal with the development of adult education or to raise the quality of adult learning and education services either through academic educational orientation, training programmes or research initiatives, except for some experimental schools of innovation and/or research. Representing an opposite trend, such new roles have been respected and promoted in the liberal adult learning and education context of the Scandinavian countries, in Britain, and in the Benelux countries, namely in the protestant part of Europe, where universities have never ruled out an approach of having to explore new roles, mission in the society and in the economy as a corporate actor.

I think such positions towards lifelong learning is clearly reflected in the ranking of the above mentioned countries in the European Charts describing the ratio of adults participating in education and training as lifelong learners amongst the available benchmark figures in Europe.³⁰ And yet, it also signals a flexible approach about lifelong learning in those countries to involve non-formal and informal learning into lifelong learning, whilst in many of the new member states in the EU have been slowly moving to recognise learning other than formal, and official statistics may not take non-formal and informal learning as relevant to lifelong learning.

5. The European CONFINTEA VI Preparatory Conference: from Budapest to Belém

It is rather peculiar that the UNESCO's Institute for Lifelong Learning insisted on higher education to play a strong role in the formation of dialogue and preparations for CONFINTEA VI in Europe. Also, the national CONFINTEA reports in 2008 indicated that most countries having valuable research, innovative tools and methods for the development of adult learning and education would require ongoing consultations with universities representing quality learning and holistic approaches in learning.

The UNESCO has dealt with the issue of promoting adult and lifelong learning in various ways, forms, and at several occasions, like at the Bangkok Interim CONFINTEA meeting and its synthesis report.³¹ However, the most reluctant indication of roles for higher education in the development of adult and lifelong learning was in the Statement of the UNESCO's Pan-European CONFINTEA VI. conference, which was held from the 3rd to 6th of December, 2008 in Budapest.

The Budapest Statement/Communique indicated at its 4th point that:

“(4) Countries should promote access to adult and lifelong education (ALE)... In addition, ***higher education institutions should become more responsive to the increasing demand for higher level qualifications; (...)***

²⁹ Jarvis 2001b

³⁰ Labour Force Survey, 2008

³¹ UNESCO, 2003

(8) Policies, structures and measures to assure the quality of learning should be developed....*Higher education along with other providers has a key role to play in this regard;* (...)

(9) **ALE is a legitimate and essential research area.**³²

These points, I think, are all relevant examples to reflect the necessary recognitions of and interrelated, interdependent status of higher education and adult lifelong education in development and change. Higher education, I argue, will inevitably play a significant role in the promotion of adult and lifelong education, while higher education will also benefit from this co-operation in case it considers recommendations of the examined UNESCO statements and policy documents.

Likewise, the Belém Framework for Action (BFA), I think, underlines the implication of several tools in order to raise participation of adults in learning and education through a human and more inclusive environment. Therefore, BFA points out, amongst other essential issues, the importance of new policy measures by stating:

‘Policy

12. Policies and legislative measures for adult education need to be comprehensive, inclusive and integrated within a lifelong and life-wide learning perspective, based on sector-wide and inter-sectoral approaches, covering and linking all components of learning and education.

To these ends, we commit ourselves to:

(...)

(e) developing or improving structures and mechanisms for the recognition, validation and accreditation of all forms of learning by establishing equivalency frameworks.’

This point gives an obvious chance for higher education to co-operate with adult education for quality learning and widening participation. One tool for raising the number of adult learners is to simply launch structures and mechanisms for validation of prior learning, according to which higher education institutions can do a lot and become the best promoter of such an initiative.

Another point in BFA to strengthen the academic basis of adult education in Europe is a clear support for quality:

‘Quality

16. Quality in learning and education is a holistic, multidimensional concept and practice that demands constant attention and continuous development....

To these ends, we commit ourselves to:

(...)

(c) improving training, capacity-building, employment conditions and the professionalization of adult educators, e.g. through the establishment of partnerships with higher education institutions, teacher associations and civil society organisations;’

That approach underlines the establishment and promotion of valuable learning city-region partnerships as a good environment for common actions to raise the quality and academic basis of adult education. Referring to BFA, point 17., therefore, points out the necessity to observe and monitor the implementation of BFA by, for example:

³² UNESCO, 2008

'17 (...)

(b) regularly collecting and analysing data and information on participation and progression in adult education programmes, disaggregated by gender and other factors, to evaluate change over time and to share good practice;'

This orientations have been widely debated and discussed by academic networks, like EUA (the European University Association), EUCEN (European Universities' Lifelong Learning Network) in co-operation with the European Commission and EAEA (European Association for the Education of Adults) so as to raise participation in adult and lifelong learning compared to the points of the Action Plan on Adult Learning and to related tasks be undertaken by higher education. One aspect to this is the re-emergence of comparative research on adult learning policies and on tools to develop adult learners' competences nad professions. (e.g. recent researches done by Research voor Belied in the Netherlands, in co-operation with academic researchers throughout Europe).³³

6. Recent challenges and trends

In 2009, the European Commission decided to dedicate the year of 2010 as a turning point with actions against poverty and social exclusion.³⁴ The aim was to raise interest and commitment referring to those issues, and, to initiate common actions in and by the member states. One choice for such step for change is to involve non-governmental organisations and the institutions, organisations of education and training in order to involve as many people in lifelong learning as possible, raising their individual skills and competencies for employability and active and responsible citizenship as *the Lisbon-process* has demonstrated that very serious economic and social obstacles hit back against through growing poverty and emerging social exclusion, therefore, learning for jobs and better social roles could be an effective agent to fight back those dangerous challenges.

It turned out that higher education ought to take a leading role in that battle by promoting quality-centred education and research, developing, for example, education and further training of teachers and trainers in public education, adult education, community and cultural education. At the same time, it should enter into concrete actions in local and regional dimensions to help lifelong learning outside the school-system, namely, giving impetus to non-formal and informal learning and, also, helping validating those kinds of learning activities, skills.

By the impact of the OECD, indicators and benchmarks have been set up to help measuring lifelong learning three-five years after the millennium, thereby, actions in countries became more comparable, yet, comparisons have also indicated differences in lifelong learning amongst EU-member and candidate countries.³⁵ Such measures were also taken by the OECD and the UNESCO. Also, the OECD and its Centre for Educational Research and Innovation (CERI) and IMHE initiated a research upon higher education and its impact on local and regional development in a global environment.³⁶

It generated further focuses on how HEIs could engage in local and regional development and strategic planning, like that of PASCAL Observatory.³⁷

In the Fall of 2009, the European Commission launched a strategic plan reaching out to 2020 in order to set a smart, sustainable and inclusive growth. Therefore, the Commission published its strategy and generated a debate of the overall document and its sections until

³³ Source: http://ec.europa.eu/education/more-information/doc/adultprofreport_en.pdf

³⁴ Source: <http://ec.europa.eu/social/main.jsp?langId=en&catId=637>

³⁵ Source: http://ec.europa.eu/dgs/education_culture/publ/pdf/education/benchmarks_en.pdf

³⁶ OECD, 2007

³⁷ Please find more at: <http://www.pascalobservatory.org>

mid-January 2010. We consider major recommendations of that Strategy, on the one hand, presumes the participation and strong alliance of education and training with a key role given to higher education and, on the other, depends heavily on a successful lifelong learning program and actions of the member states and individual citizens in adult learning and education.

Major elements of the *Europe 2020 Strategy* is as follows:

- **Smart growth** - fostering knowledge, innovation, education and digital society;
- **Sustainable growth** - making our production more resource efficient while boosting our competitiveness;
- **Inclusive growth** - raising participation in the labour market, the acquisition of skills and the fight against poverty.

The Commission proposes the following EU headline targets for 2020:

- 75 % of the population aged 20-64 should be employed;
- 3% of the EU's GDP should be invested in R&D;
- The "20/20/20" climate/energy targets should be met (including an increase to 30% of emissions reduction if the conditions are right);
- The share of early school leavers should be under 10% and at least 40% of the younger generation should have a tertiary degree;
- 20 million less people should be at risk of poverty.³⁸

It is worth recognising that this Strategy for 2020, from the aspect of a lifelong learning approach, can only be achieved, altogether or partially, in case education and training systems in the European Union will make use of growing national funds and EU-grants in planning and achieving programmes and project alongside with national goals, in exploring local and regional factors, and participating partnership-based developments and innovations. One basic condition and principle to this initiative is a clear engagement in co-operation amongst public education, VET, higher education, adult education providers so as to promote higher number of learners, better learning results, and more enthusiasm towards learning itself. It is worth examining who has what roles and responsibilities in that process!

In spite that there is a new government today in Britain, another visionary plan on education and learning was the *Learning Revolution* document of the British labour government in Spring of 2009 to generate more attention to:

- **Building a culture of learning;**

Empowerment, participation of citizens, Commitment/engagement;

- **Increasing access to Informal Adult Learning;**

Supporting the learning of older and of disadvantaged people; Development of community learning; Promoting informal learning at work;

- **Transforming the way people learn through technology.**

Developing skills for using new technologies; Promoting new forms of partnerships.
(Department for Innovation, Universities & Skills, 2009)³⁹

It is obvious that higher education, according to the Cape Town Statement of the UNESCO, has got a key role in the development of lifelong learning and active citizenship within and

³⁸ Source: <http://www.2010againstopoverty.eu/news/news/news29.html?langid=en>

³⁹ Source: <http://www.dius.gov.uk>

outside the school-system in co-operation with stakeholders promoting continuing and quality learning.⁴⁰ That mission may be considered as a third one, however, it must be well-understood that universities are only one of the stakeholders and that co-operation is an attitude for them so as to survive in a global economic context with social implications at local and regional levels. That is one of the main challenges of the Education and training 2020 plan of the European Council.⁴¹

- **Strategic objective 1: Making lifelong learning and mobility a reality**

Benchmark: By 2020, an average of at least 15 % of adults should participate in lifelong learning (3.8 – HUN)

- **Strategic objective 2: Improving the quality and efficiency of education and training**

Benchmark: By 2020, the share of low-achieving 15-years olds in reading, mathematics and science (3) should be less than 15 %.

Benchmark: By 2020, the share of early leavers from education and training (5) should be less than 10 %.

- **Strategic objective 3: Promoting equity, social cohesion and active citizenship**

Benchmark: By 2020, at least 95 % of children between 4 years old and the age for starting compulsory primary education should participate in early childhood education.

- **Strategic objective 4: Enhancing creativity and innovation, including entrepreneurship, at all levels of education and training**

7. Conclusions

I think that the UNESCO has so far played a significant role in and has, therefore, had a peculiar impact on promoting university lifelong learning and in the development of adult and lifelong education for all. CONFINTEA VI and its Belém Framework for Action reflected that universities, being engaged in the development of their institutional structures, educational and research provision, can take respected roles to develop the quality of adult learning and education to enhance active citizenship and critical thinking. At the same time, universities are the right place to continue significant researches on adult learning and education in accordance with Budapest CONFINTEA VI Declaration of 2008 in order to reach for better performance in adult learning and education. Also, universities ought to recognise UNESCO statements and recommendations for further considerations and take them into comparison and debate, I suggest, together with the points of the Lifelong Learning Charter of the European Universities' Association⁴² and other respected communiqués. This would enable universities to take an active role in organising CONFINTEA VI national follow-up actions and platforms.

On the other hand, higher education institutions must continuously move along with quality developments within their own organisational structures to strengthen their functions as learning organisations and places of innovation, creation and dissemination of knowledge in a more flexible manner so as to promote economic development and social changes. The third mission of the university and its implications, in accordance with BFA goals, may allow complex roles represented and realised towards local and regional partners in case universities recognise the tasks of consultation, better forms of partnerships with stakeholders and learners to balance the economic challenges with more social orientation and missions by the

⁴⁰ UNESCO, 2001

⁴¹ European Council, 2009

⁴² EUA, 2008

integration of good examples of corporate and active citizenship, governance and social inclusion.

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Is there a Chance for Roles of Higher Education in the Development of a ‘Learning Climate’ through Regional Development in Hungary?¹

1. *The Impact of Lifelong Learning upon Institutional Strategies or the Underestimation of University Lifelong Learning*

The Trends V report of the European University Association (EUA) pointed out in its fifth chapter that ‘lifelong learning has thus been developed more on the periphery of institutional strategy, rather than as a driving element of it.’² This statement is very true in the case of Hungarian higher education as most universities and colleges have not got too much to respond to the issue in their institutional development plans which has a compulsory structure to follow as part of the new Act on higher education in Hungary in 2005 (Please find more at Hungarian Accreditation Committee website). Hungarian universities and colleges have outlined lifelong learning as an important issue for their structural change in the so-called ‘Bologna-reform’, but there was not a hint of reference to a broad understanding of lifelong learning in the well-known ‘triple-helix model’.³ The strategy for lifelong learning of the Hungarian government in 2005 did not mention any aspect of university lifelong learning rather than moving universities towards a more quality oriented structure and opening up for widening access (Please find more at Hungarian Ministry of Education website).

Unfortunately, the EUA Trends V report does not say too much, but it still recognises that ‘a number of institutions indicated that lifelong learning is an area of growth, an area where diversified funding sources can become more dominant, and *an area of great possibilities for regional cooperation and development*.’⁴ It is, for EUA, a clear signal for developing new training programmes and centres of innovation and R+D.

In Hungary, universities being members of the Hungarian Lifelong Learning Network (Please find more at MELLearn website) have started, since 2006, moving to explore local and regional issues influencing higher education, still no involvement in ‘regional policy development’ has not yet been recommended at any of the network’s conferences on lifelong learning. Universities and colleges, however, have got engaged in some local and regional development or at least in modelling some R+D with local and regional industry, trade, the chambers of commerce and/or the local councils.⁵ On the other hand, the MELLearn network was the only forum where some of the universities and colleges debated the content and theoretical frames and impacts of a ‘third role’ for higher education as a identical part of lifelong learning opening towards the public and suggested a new direction to strengthen a social responsibility in making people understand change itself by expanding useful knowledge regardless of age, sex and economic/social status.

I do think, therefore, that regional development must be bridged to taking higher education into a new status of empowering the local and regional environment of institutions, associations and the people in order to get prepared for partnership-based roles in the knowledge-based economy and society. New roles for higher education were attached to the ‘Bologna-reform of higher education institutions’, yet, the social roles of universities and colleges local and regional development and regeneration were not underlined enough. The EUA findings on lifelong learning practices of universities referring to a variety of offers in regional development through open and distance learning, and networks of partnerships and

¹ This paper was written in October 2010

² Crosier, D. – Purser, L. – Smidt, H., 2007

³ Dobay, 2007

⁴ Crosier, D. – Purser, L. – Smidt, H., 2007

⁵ Németh, 2008

collaboration with local stakeholders are very low- or under-represented by Hungarian universities and not at all understood as an important issue for higher education.⁶

2. The Accelerating Role of Higher Education in Regions through the European Lifelong Learning Initiative

2.1. European Backgorund

It is essential to look back upon the European starting steps in the theme of lifelong learning to have been influencing the scope of new roles for higher education. The first step towards lifelong learning within the context of the European Union was taken through the European Lifelong Learning Initiative (ELLI) in Rome in 1995, when researchers in education opened a public forum at a conference for promoting learning and the development of quality of content, process of education.⁷

The emerging role of higher education institutions in the development of lifelong learning is obviously essential for making lifelong learning a reality as universities and colleges, since the late 1990s, contribute to the realisation of that initiative and Lisbon-goals, together with the aims of the *Education and training 2010* working programme. The latest document clearly pointed out the role of higher education.⁸ Also, the working programme was strongly attached to the goals outlined in the concrete future objectives of the education and training systems of the member states of the European Union and reflected three strategic dimensions which explain the roles of higher education in developing lifelong learning:

These are:

- 1.) The development of the quality and efficiency of the education and training systems within the European Union;
- 2.) The development of opportunities and access to the education and training systems;

(The two points are both reflected in the well-known *Bologna-process* to highlight the steps forward the European Area of Higher Education.)

- 3.) The developmment of forms external partnership of education and training systems.

(This point was embedded into the framing of *learning cities and regions of lifelong learning* initiatives in and after 2001, namely, into the development of learning cities, regions and related good practice in some of the member states.)

The third point of the working programme explains that higher education, as part of the education and training system, must be open and act as a partner in local and regional partnerships to develop communities!

The indicated points underline the initiative of the European Commission which, since 2002, has been supporting the establishment or change and modernisation of local and regional spaces of lifelong learning. The aim is so as to get formal, non-formal and informal learning closer to each other, referring to the partnership of public administration, higher education, chambers of commerce and industry, sectors of economy, culture and civic society by forming regions of lifelong learning.⁹

⁶ Derényi, 2007

⁷ ELLI, 1995

⁸ EC, 2003

⁹ EC, 2002

Models/frames for possible local and regional partnerships in Hungary to involve higher education institutions:

- **Pole-development programme** (Effective participation in economic cluster-development);
- **Establishing learning regions** in order to support partnership-based programmes of co-operation for education and training, knowledge transfer, competence development, R+D models, etc.
- **Creation of knowledge-centres** in the heart of regions through the infrastructural basis of higher education (it is a model of combined access to library, informatics and cultural services to recognise local and regional learning and development needs of the public and private spheres!)

Hungarian higher education must identify key priorities in relation to lifelong learning according to the approaches to some peculiar international organisations, like EUA, EUCEN, PASCAL.

European Universities Association¹⁰ pointed out in 2003 that higher education ought to recognise important dimensions of lifelong learning leading to strategic changes, such as:

- Higher education has a key role in creating a real scientific frame and discussion for adult and continuing education through the lifelong learning initiative referring to the quality development of education and training and to the practice of learner-centered assessment;
- Higher education institutions must be involved into consultations on formulating national lifelong learning strategies;
- The innovative potential of higher education must be considered (e.g. the pole development programme in Hungary);
- Most higher education institutions in the countries of Central-Eastern Europe do not imply lifelong learning into their strategies and missions. (Therefore, it is important to underline the role of institutional development plans to imply dimensions of lifelong learning, like bringing learning closer to the learner through new forms of learning);
- The European lifelong learning discourse has pointed out the formerly underestimated co-operative role of higher education to involve stakeholders into the discussions on creating a better learning climate, like market players, civic organisations, local and regional councils, cultural institutions. This role has been criticised by traditional academics;
- Adult and continuing education is not recognised in higher education institutions with the same scientific respect as other subject areas of education and research, even in countries where lifelong learning, adult education is so important in the education and training system (e.g. the United Kingdom, Finland, or Sweden).

3. The functional reconstruction of higher education

After the turn of the millennium, scientists dealing with the functional changes in higher education indicated that the co-operation of universities and colleges with the economy is primarily influenced by changes occurring within the organisations of higher education. In case they recognise the meaning and role of partnership-based, innovation-centered approaches referring to lifelong learning, they will have the motivation to construct new

¹⁰ EUA, 2003

forms of local and regional co-operation in order to develop learning opportunities, methodology and content. That is to indicate the corporate role of universities.¹¹

Universities and research institutes as centres of science have become important stakeholders in regional development to expand and disseminate knowledge of innovation and to change capacities. The valuable attraction of a region depends today on balanced networking of higher education institutions, companies and community organisations (NGOs). Partnerships amongst universities and companies, according to Gál¹² make regions develop their innovative potentials through knowledge transfer mechanisms, therefore, innovation, in my approach, must be considered as an interactive and systemic process which has a spatial format to host co-operations of organisations of transferring knowledge in a network.

4. Social/third role of higher education

It is a very accurate and relevant question of reconstructed university roles to open up for a third mission for universities and that is to help the community change and develop through special actions which are not related to education and training. This problem affects the cultural roles of universities too. Doyle pointed out that HEIs activities on the cultural front are subsumed within other policies and strategies and areas of enquiry. A peculiar impact according to this issue is that HEIs do not research themselves as often and as effectively as they do everyone else, particularly the third role they have as a cultural presence and cultural resource, Doyle remarked.¹³

In Hungary, higher education institutions have recognised a role for lifelong learning, adult learning, yet they are means for raising the number of students and to change structure through the Bologna-reform. Another narrative of lifelong learning is to work closely with the community, but mainly with economic organisations and institutions. On the other hand many universities have also come to the conclusion that a change in public attitudes are really challenging higher education. Lifelong learning made missions of universities and colleges taking up corporate roles and a constraining factor to search for new models of partnerships. I personally think that higher education is in a crisis of finding new tools and methods of education for new, or changing clients with changing learning needs.¹⁴

Interestingly, a very unique Scottish example brought in the value and status of academic knowledge and expertise as something to be understood as public property for deployment so as to enriching the social and cultural contexts in which they born.¹⁵ That is an essential realisation of knowledge and expertise being connected to social and community platforms which today need higher education to take more responsibility and action, I think, in Hungary has also become a reality. Universities and colleges have not yet explored, in required dynamism, new tools available for such new public policy of higher education to serve and to co-operate with their communities. The underrepresented status of forms of blended-learning and e-learning is a key indicator of emergence and impact of higher education's new roles in Hungary.

Also, there must be a stronger position of higher education in Hungary for education of citizenship and active citizenship. That direction has also been neglected in many universities and colleges in Hungary over the last fifteen years, however, some schools of adult and continuing education, like the Department of Adult Education of the University of Pécs, opened up education and research¹⁶ on active citizenship and governance influencing adult

¹¹ Jarvis, 2001

¹² Gál, 2005

¹³ Doyle, 2007

¹⁴ Németh, 2007

¹⁵ Crowther – Martin – Shaw, 2006

¹⁶ RE-ETGACE, a Framework V. Project, 2004

education and learning. Johnston suggests a same model Hungarian university adult education should consider¹⁷ when we try to influence university management to develop partnership with its community outside higher education. Dobay argues, therefore, that a new and „regionally anchored” university charter/mission would be needed.¹⁸ It is another symptom of searching for answer for a changing learning environment, as clear signal of new community directions and connections need for higher reeducation in Hungary.

On the other hand, the content and current implications, narratives of lifelong learning may be misleading in case higher education does not get actively involved, especially in Hungary, into the process of reconstructing the national strategy of lifelong learning. Higher education ought to indicate that it has a strong role in lifelong learning not only at national level, but also through local and regional innovation, knowledge transfer.¹⁹

The role of higher education should not be narrowly focused to the Bologna-process and its implications in structural reforms of education and training of higher education institutions. That is why a more holistic understanding of university lifelong learning should appear in a new national strategy of lifelong learning after 2008!

In that respect, it is essential to underline, according to major trends in explaining lifelong learning in Europe, the relevance of the joint presence of employability and active citizenship to represent an European approach upon learning. The framing of lifelong learning by the European Commission²⁰ and the UNESCO standpoint clearly indicate that the roles of higher education combine economic and societal impacts.²¹

Higher education in Hungary must take a special societal function which exceeds the dissemination of knowledge. While it tries to reconstruct the contents and methods of its traditional work, it enters into a process of innovation that influences not only economic structures, but also individuals and communities in searching for partnership-based activities in local and regional settings facing challenges. At the same time, higher education institutions join many kind of models of innovation which require a capacity of innovation and change an university can represent and make use of.²²

Vincent-Lancrin, a researcher of the OECD-CERI has also pointed out in his study that: one of the points of functional change for higher education is taking complex social role by supporting lifelong learning through emphasizing bringing in quality content for learning based upon economic innovation and social partnerships to address local and regional learning needs.²³

In Hungary, there are also some researches analysing the roles of higher education regional innovation systems. Zoltán Gál has studied the so called ERIS survey, in which the role of universities in regional development was compared, and reflected accordingly that universities are institutions to make use of, or suffer the impact of spatial structures of innovation. In the case of Hungary, regional (non Budapest-based) universities are the subject of improving organisational systems and innovation potentials as part of regional innovation structures in the era of transition or transitory period.²⁴

Narratives having appeared so far in Hungarian higher education have been, in many terms, contradictory, reductionist, in which one would find traditional, economy-oriented human

¹⁷ Johnston, for connecting adult learning and citizenship (learning about citizenship; learning through citizenship and learning for citizenship) 2005

¹⁸ Dobay, 2007

¹⁹ OECD, 2007

²⁰ EC, 2000

²¹ UNESCO, 2001

²² The former 3L, now 'Learning for Life' (TÉT) Commission of the Hungarian Academy of Sciences (HAS/MTA) accelerated the debate over university lifelong learning!

²³ Vincent-Lancrin. 2004

²⁴ Gál, 2005

resource development explanations referring to continuing education, distance education tools and methods.²⁵

The reductionist or narrow views upon university lifelong learning in Hungary occurs by replacing university lifelong learning by the Bologna-reform, yet trying to explain that lifelong learning has been a social and political wave leading to it.²⁶

I would like suggest that universities engage, on the one hand, in the development of education and training quality through capacity-building for mobility of staff and students.²⁷ On the other hand, better financing and management, organisational development, etc. will also becoming a key issue for universities to be debated in local and regional context (Equipe+ Project highlights that issue in between 2006 and 2008). It is why local and regional programmes of/for partnership with higher education participation must have strong relations towards the national development plans (e.g. NFT, UMFT in Hungary) to incorporate the learning region initiative (Please find more at the website of National Development Agency) I think that there must be some points of directions or points which indicate ways forward. Therefore, I want to describe some important issues and challenges to influence university lifelong learning in Hungary:

- Unfortunately, lifelong learning, nowadays, is generally understood as a matter and tool for employability as an issue for higher education to handle. This narrative was pointed out by the European Universities Association latest report²⁸ according to the European higher education area, which did not bring overreaching reasoning and answers to main challenges of university lifelong learning Hungarian higher education should consider.
- Higher education in Hungary should promote access to and opportunities in learning being influenced by current social and demographic trends. In that respect, various forms local and regional partnerships must be favoured in order to keep a leading role in a changing structure of education and training.²⁹
- Hungarian higher education institutions should participate in developing competencies and human resources of decision making bodies and stakeholders (e.g. local and regional councils) and to raise their own capacities of innovation, the quality of knowledge transfer leading to fulfillment of functional reconstruction (Observatory PASCAL).

This partnership building, according to Jarvis, can only be successful in a construction of mutual interests and engagement.³⁰

- Institutions of higher education in Hungary should get involved in comparative analysis of lifelong learning strategies available and in the development of modern frames for regional co-operation models.³¹
- Hungarian higher education institutions will have to consider the challenge of accreditation of prior learning, also referring experimental non-formal and informal learning, especially in the workplace. That is one of the message of the *Memorandum on Lifelong Learning* strongly tied to the Lisbon-strategy linking formal, non-formal

²⁵ In Hungary, lifelong learning is narrowly understood as a tool for employability and is mainly reflected in training-orientations of policy-documents to neglect such important issues as second chance schooling, youth-development, environment-development oriented education, active citizenship, etc.

²⁶ Derényi, 2007

²⁷ van der, Hijden, 2007

²⁸ Crosier, D. – Purser, L. – Smidt, H., 2007

²⁹ ibid, 2007

³⁰ Jarvis, 2007

³¹ ibid, 2007

and informal learning together. It is also relevant to make universities and colleges to recognise a partnership for education and training outside higher education, but with its dynamic participation in local and regional initiatives to support *lifewide learning* as well.

- Networking development is another key issue in university lifelong learning Hungarian higher education must plan and develop through the Hungarian Universities' Lifelong Learning Network Association (MELLearn). This Network organised its annual thematic conference around the theme of roles of universities and colleges in regional development which can be seen as a good start for implementing new methods and structures for organisational development for innovative actions.³²
- It is worth recognising that the so-called *regional innovation strategies (RIS)* indicate what potentials universities currently have in network-building, barriers of developing connections, relations between higher education and economy, and the strategic roles of RIS.³³

I do share the point of Reichert referring to the importance of knowledge regions. They are, in Hungary, reflected through the regional development poles according to which universities have an essential function, namely, to help economic cluster emerge through the co-operation of industry, trade and higher education. Only those higher education institutions will be able to make use of such models which also change their own organisations targeting research and development as a key area, and not forgetting about the social roles and functions focusing on the dissemination of knowledge.³⁴

5. The example of the learning region forum – a chance for promoting a 'new learning climate' by higher education through regional development

It is more than obvious, that the changing role of Hungarian higher education in local and regional development can only be incorporated into recent networking frames in case there is a realisation of having to create new channels of teaching and learning, to join knowledge transfer having been constructed and managed by stakeholders, economic organisation, and by the education and training systems. A new learning climate will be based and developed through holistic lifelong learning views to enter not only into education and training, but also into research and development systems and into other corporate responsibilities of higher education institutions in Hungary.

The Faculty of Adult Education and HRD of the University of Pécs, therefore, has initiated a discussion amongst the City Council of Pécs, the South-Transdanubian Labour Center, the Pécs-Baranya Chamber of Commerce and Industry and the Pécs Regional Training Centre to develop adult education and training within the frames of a 'Learning City-Region Forum'.

The Department for Human Affairs of the City Council of Pécs organised the first meeting for leaders of those institutions and organisations where delegates discussed major issues in relation to the planned Forum and its structure. The Faculty of Adult Education and HRD would, according to plans, host each quarter of an year the sessions of the Forum to have discussions in the morning referring to current trends and issues, and, to have public presentations on adult learning related to formal, non-formal and informal settings in the afternoon.

³² MELLearn, 2008

³³ Gál, 2005

³⁴ Reichert, 2006, Németh, 2008

The group has a main aim to develop a better learning climate for adult learners in traditional and new environments, like it was suggested by Baert.³⁵ The related presentation will explore the environment of organisational and relevant contents-oriented issues.

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Country report on the action plan on adult learning: Hungary¹

1. Context

Adult learning and has been recognised as part of adult education in Hungary for a long time. It was only after UNESCO CONFINTEA V in Hamburg that policy interests and approaches have given attention and obvious recognition to adult learning, especially in the last ten years. This is partly a result of the Lisbon process in education and training (e.g. the Memorandum-debate and the ET2010, Copenhagen processes to follow), and of the preparation process for UNESCO CONFINTEA VI.

1.1. Socio-economic context

The accession process and the full EU-membership has helped the country to make some very important reforms in social and economic terms in accordance with the so-called 'Acquis' of the European Union. Hungary has used several EU-funds and programmes to turn major state-run systems, such as public governance and education (public education, tertiary education, VET, non-formal adult training, etc.), into more efficient and quality-oriented ones referring to equal opportunities and access for everyone.

On the other hand, the education and training sector, which strongly influences adult learning, has been hit by the effects of globalisation and technological progress. These have led to strong aspirations to reach for accelerated transformation and adaptation by considering social and economic demands and 'demographic realities'.

Unfortunately, Hungary's economy has suffered over the last five to six years, in terms of both the global and regional context. Economic stagnation and then crisis has strongly influenced adult learning participation, because many adults have recognised adult learning as a way to find a better position in the labour market. On the other hand, most employers have raised or even changed their demands towards their candidate/future employees referring to special labour market skills and to some learning skills too. This trend was partially recognised by the state, and the government has intervened with some major legislative and financing tools. These tools aim to raise participation by adults in education and training programmes in both formal and non-formal settings. The core issue, despite these measures, is that the participation of adults in lifelong learning has stayed far behind the EU-27 average.

The systemic development of continuing education and training through labour offices and nine regional training centres, since 1993, has helped adult learning to become a significant tool for developing employability. However, the 2001 Act on Adult Education and its modifications could not help generating a close relation amongst formal, non-formal and informal learning, and recognising open and flexible forms of non-formal and informal learning to help reduce unemployment.

According to the CONFINTEA VI report of Hungary, the primary function of adult education changes in relation with economic and social processes. At the beginning of the 1990s, retraining was a dominant characteristic as there was relatively high unemployment, occurring as a result of large-scale staff cuts in industry and agriculture. Today it is further training and the demand for competence-based training which dominate the sector.

It must be mentioned that the realisation of the functions of adult education is an especially important social objective in disadvantaged social groups, the attaining of which is only possible with the realisation of continuously provided target programs. A description of the structure can be found in section three.

¹ This paper was written in October 2010

1.2. Historical-ideological context

There is a longstanding tradition of adult education and training in Hungary from the 19th century and onwards in formal, non-formal and informal settings. Historic research shows a variety of movements, and the institutionalisation of adult education in the last one-hundred and fifty years.

At the time there was intellectual experimentation, following some international and western approaches. From the 1980s there was a shift in adult education to follow the trends in research and development. The UNESCO CONFINTEA IV in 1985 brought new theoretical and practical trends and issues to reflect on.

Hungary, by turning into a liberal democracy and market economy in 1989/90, opened ways to the new development of formal, non-formal and informal adult learning. This became a consensus amongst parliamentary parties. From 1990 adult education in the country could develop as an organic system, without state hegemony.

The suddenly advent of high unemployment in 1991 and afterwards turned politics to recognise adult education and training as an effective tool to put down unemployment and to help generate better economic conditions and growth. In the 1990s, adult education and training was mainly considered to tackle illiteracy, lack of vocational qualification, and, accordingly, to train as many adults as possible. But this approach slightly changed after the millennium, when the memorandum debate on lifelong learning and the preparations for a new Act on Adult Education gave way to a more quality-centred focus, especially after 2002. Recent governments have tried to respond to this shift, but their actions focused mainly on labour market claims and had no significant strategy for introducing a coherent plan or widespread consultation with major stakeholders to improve all sectors of adult education. That is why not only second chance schooling, but also adult learning in cultural contexts have not yet received peculiar attention other than some responses to EU-funded or guided projects and initiatives.

Since May 2010, the newly elected government has recognised that adult education is an important aspect of economic, employment and social policies. As a result the Ministry has outlined actions to change the law in order to renew accreditation and update related sanctions, It aims to modernise VET in adult education and training with the Ministry of National Resources, the Chamber of Commerce and the Regional Development and Training Committees, as well as other major stakeholders, in order to improve quality learning, better work performance and social responsibilities.

2. Political and legal framework

According to the Hungarian UNESCO CONFINTEA VI National Report, the adult learning and education policy (ALE) legislative environment complies with the EU directives and objectives, which are implied in the Memorandum on lifelong learning, and in the Lisbon objectives. The ALE objectives are closely related to employment policy; this is clearly reflected by the fact that adult education (since 2004), and the professional control of vocational training (since 2006) has been shifted to the responsibility of the ministry responsible for employment policy.

On the other hand, Hungary has achieved full membership into the European Union, marking a new phase of the successful process of accession and integration. This means education and training have become a part of those peculiar policy areas where EU member states, according to the Lisbon agreement, initiated the use of the open method of co-ordination. As part of that special mechanism, Hungary, by the Autumn of 2005, produced its Strategy for Lifelong Learning which outlined a coherent policy frame for lifelong learning.

The main objective of the strategy was to structure its fields of intervention along five priorities in order to introduce a comprehensive reform of the education and training system. These priorities will respond to individual demands throughout the life-cycle:

- Equal opportunities;
- Strengthening the links between the education and training system and the labour market;
- Application of new governance methods;
- Enhancing the efficiency of the education and training system, and increasing related public and private investment;
- Improving the quality of education and training.

The strategy distinguished the following areas of intervention:

- Development of basic skills and key competences in public education;
- Improving the standards of school preparation based on personal development;
- Emphasis on key competences;
- Transformation of secondary education with a view to competence development: competence-based secondary school leaving examination.

The key to adaptation is a diverse and abundant supply in vocational education, higher education and adult learning:

- Modernisation and streamlining of the institutional network of training;
- Establishment of higher education-based regional knowledge centres;
- The successful implementation of the Bologna Process in higher education institutions;
- Development of the school-based/formal adult education in higher education institutions.

Ever-extending learning opportunities:

- Making the use of information and communication technologies a basic requirement;
- The future of learning at the workplace;
- Creation of learning and development partnerships through the inclusion of social partners in order further to improve and boost the efficiency of the entire system of further training;
- Introduction of a national prize and financial incentives for employers who support training at the work-place on the basis of Western European models;
- The prospects of informal learning and alternative learning forms;
- Development of distance learning.

Further areas of intervention and for innovation:

- Career guidance, counselling and monitoring;
- Recognition of informal and non-formal learning;
- Supporting disadvantaged groups and groups at risk on the labour market;
- Rethinking social assistance and creating an environment that encourages the combination of learning and work;
- Establishment of a new teaching/learning culture;
- Developing a culture of quality.

According to the Hungarian CONFINTEA VI report, a number of legal documents regulate the sector.

The special laws encompassing school system education and training relating to public education, vocational training and higher education were established following the change of regime in 1993. These laws also contain the regulations of school system adult learning and education. To supplement these, an act regulating non-school system adult education was passed (Act CI of 2001) on adult education in 2001, which was followed by various developmental government measures (e.g. regarding the quality assurance of adult education institutions). It is significant that the adult education act is a so-called “framework act”, which implies special regulations relating to adult education institutions and adults (e.g. the regulations of the starting and continuation of an adult education activity, or the conclusion of adult education contracts with persons admitted to the training program). At the same time the appropriate special acts imply the general conditions and regulations relating to adult education (e.g. to financing (support), or the content of the vocational training). Following accession to the EU, government documents entitled “Lifelong learning strategy” and “Vocational training development strategy 2005-2013” were drawn up in 2005. These strategies outlined the main objectives of adult education, and main measures and priorities of the strategies also appeared in the national development plans.

Please find a detailed description of the specific legislative framework in the Eurybase National Education System in section 7.3, which addresses the specific legislative framework. In conclusion, the development of legal tools referring to adult learning and education reflect a rather top-down approach in the field of education and adult education. It is felt that it is also worth focusing on a bottom-up approach, to channel practical knowledge of stakeholders and providers. In addition, the state should initiate a revision of the 2005 Strategy on Lifelong Learning and of the 2001 Act on adult education and take examples, for the sake of effectiveness, of some Western-European and Nordic countries to modernise the legal framework of adult learning and education in a more holistic manner.

3. Structural and financial framework

3.1. Structural framework

The structure of adult education in Hungary is as follows:

- Within the school system (elementary and secondary school) it is possible for adult learners to acquire higher school / vocational qualifications.
- Within the non-school system of adult education:
 - Professional basic and further training according to the needs of the individual and the situation on the labour market, so for the purpose of:
 - Acquisition of first vocational qualification;
 - Vocational retraining (acquisition of second or further vocational qualification);
 - Vocational further training (primarily in accordance with employer demands).
- General knowledge training, primarily for the purpose of acquiring the knowledge required to start a vocational training course (e.g. mathematics, natural sciences, engineering), within the scope of so-called cohesion programmes.
- The acquisition of knowledge in connection with the world of work, primarily:
 - Acquiring career orientation knowledge (career selection, career correction);
 - Acquiring job-finding knowledge and skills.
- The acquisition of key competences, primarily from the range of competencies determined in the reference framework approved by the European Union. Particularly important competencies are:
 - Speaking the mother tongue;
 - Speaking foreign languages;
 - IT skills (digital), and

- Entrepreneurial knowledge and skills.
- The extension of general knowledge competencies, primarily from the range of competencies determined in the reference framework approved by the European Union, for example:
 - Citizenship awareness;
 - Competencies involved with cultures living side by side;
 - The development of non-formal and informal learning opportunities.
- The development of learning competencies, primarily according to the approach expressed in the reference framework approved by the European Union, including the popularisation of learning as an adult.

3.2. Financial framework

The financing of adult education rests on four pillars (the latest available data on the ratios are from 2007):

- Central budget (the maintenance of regional education centres and the training of target groups, 12 per cent);
- Certain parts of the Labour Market Fund (primarily for the education and training of unemployed persons and other target groups);
- Employers' statutory contribution to vocational training by paying VET tax (1.5 per cent of wage costs) and organising in-service training courses training for staff (the contribution of VET tax to financing is 33 per cent);
- Those participating in the training (primarily fares and textbooks and, to a smaller degree, tuition fee or training contribution); ratio in financing: 33 per cent;
- Other resources, e.g. applications (10 per cent).

Businesses pay for the education and training of their own employees if the training is not the initiative of the employee. In this field there is a governmental incentive: companies can allot one-third of the obligatory vocational training contribution (1.5 per cent of labour costs) for the education of their own employees; in the case of small and medium enterprises, the proportion is 60 per cent.

Recent trends in financial schemes:

1. From the central budget:

- There is support for the public education school system, for both full-time and part-time learners. Trainings are basically supported by maintainers on normative grounds (85 per cent of them are local authorities), higher education is mainly supported directly from the budget of the Ministry of National Resources (Former Ministry of Education and Culture);
- Typically there is support for the training of the state institutes' own employees.

2. From the budget of local authorities:

- The budget of the public education school system and training institutes is ensured;
- There is financial support for further training programmes of the VET oriented local training institutes' (local VET schools and VET secondary schools) own teaching staff.

3. Allocated state funds:

- The Labour Market Fund is a central fund for employment and training, of about HUF 400 billion. It supports adult training by allocating a fund for employment (training the unemployed and people looking for jobs), and a fund for training (the development and support of school-system vocation training and adult training).

4. Social insurance:

- Trainings, further trainings of the employees of state owned firms, institutions and organisations.

Apart from the above:

- The financing of trainings at companies is partially supported by the state, but companies are increasingly bearing the costs from their own other incomes;
- An increasingly significant role is played by the economy. One of its main areas is the vocational training contribution system, which is regulated by law. In the framework of this, companies and enterprises are obliged to pay a vocational training contribution equivalent to 1.5 per cent of their wages costs. These obligations can be fulfilled in different ways:
 - Payment into the Labour Market Sub-Fund (51,8%)
 - Practical training provision for VET students at enterprises (19,8%)
 - Vocational training (secondary) schools (13,2%)
 - Training provision for own employees (9,6%)
 - Practical training provision for the Higher Education (5,6%)
 - (source: <http://osap.nive.hu/statisztika>) 2009

4. *Problems and opportunities for participation in adult learning*

The main barriers and opportunities for participation of adults in lifelong learning in Hungary are the following:

- Barriers: unemployment, lack of effective financial tools, lack of time, social inequalities, poverty, lack of motivation, lack of learning opportunities in local/rural contexts; bad learning experiences. (These barriers may vary depending on the individual and the social/physical environment);
- Opportunities: development of funding sources, variety of VET programs for adults in non-formal settings, growing actions and programmes of adult learning and education offered by NGOs.

It is important to underline that the main target groups of adult education are the unemployed and undereducated, unskilled adults. On the other hand, it should be recognised that there is more than one target group in Hungarian adult education and training. The adult education and training system in Hungary is heavily constrained by labour market policy approaches, and so another major target group is adults at employment age (25-64) participating in labour market training, or preventive training. Young adults in the age cohort of 15-24 form another important target group.

The CONFINTEA VI report produced by the Ministry of Social Affairs and Labour indicates that the special target groups are (according to most relevant ALE programmes):

- The Roma (e.g. programmes for catching up, job-seeking techniques);
- The elderly (e.g. IT skills, continuing training);
- The homeless (e.g. programmes for catching up, job-seeking techniques);
- Those receiving childcare benefits (e.g. professional continuing training, returning to work);
- The unskilled, unschooled (e.g. acquiring first profession, catching up, acquiring school degree and vocational qualification at the same time in cooperation with schools, career orientation, job-seeking techniques, enterprising knowledge).

The sectors in which particular difficulties are faced in reaching the identified target groups are the VET-sector, the cultural sector, and the school sector/public education (formal education).

The most important barriers for adults participating in learning in Hungary are a mixture of institutional, situational, and dispositional barriers, and it very much depends on the individual learner which of the three types have the strongest impact. Yet, some main barriers to adult learning in Hungary are the lack of necessary entry qualifications, and the absence of relevant programmes (or rather the unequal provision of adult education and training programmes in a geographical sense). Also, poverty, or relative poverty and low income, are the strongest situational barriers together with the time-constraints and, in more and more cases, the distant location of available courses.

On the other hand, bad experiences of former education, the lack of confidence in personal capacities and a lack of support from the employer can all result in severe barriers to quality adult learning. However, another barrier is that non-formal and informal adult learning do not represent real market value for experts and representatives of (adult) educational policy. Moreover, the rate of under-qualified and under-educated adults is rather high, which is reflected by the lack of learning capacities, and the lack of learning aspirations. Finally, a problematic barrier is that adult education and training in Hungary has become narrowly market-oriented, leading to a lack of access to education for adults. Concrete policy measures and specific instruments are generally used at national and EU level to remove barriers as part of the Lisbon-objectives indicated by the Memorandum, and the Action Plan on Adult Learning.

One of the most important opportunities for adults to participate in learning is the appearance of non-formal learning through a stronger non-governmental sector. However, a major barrier is poverty. Another opportunity is the recognition of prior learning in non-formal and informal environments, which accelerates the desire for learning.

Consequences: it is worth recognising that the identification of barriers and opportunities will not solve the problem of participation nor improve the quality measures being used. However, this process will help to explore current issues and obstacles to participation and provision and will also generate more effective planning. In Hungary, therefore, the socio-economic background of those adults for whom it is difficult to engage in learning is pertinent. Poverty, unemployment, instable family-social status, a low income or an undereducated, unskilled individual background caused by leaving school early can all have an impact on rates of participation.

5. Clusters of measures

As part of a mobilising strategy at national level, major instruments have been used to increase participation of adults in lifelong learning. They are as follows:

- The Act on Adult Education and its quality management references after 2001;
- The National Lifelong Learning Strategy from 2005;
- The National VET Development Strategy for 2007-2013.

Other instruments are the Human Resources Operative Programmes of the National Development Plan for 2004-2006 and the Social Renewal Operative Programme of the New Hungary Development Plan for 2006-2010.

These strategies consider the necessary reflections/actions to the EC-Memorandum by establishing guidance and counselling services based in Regional Employment Centres. These centres aim to prepare young adults by identifying major labour market demands according to

the most relevant vocations. FIT-Employment Information Counselling has been in place since 1992, with help from National Euroguidance Centres.

Disadvantaged groups are provided with counselling services (e.g. career orientation training) by the nine regional workforce training centres. Providers of adult education and training (enterprises and non-profit organisations alike) also offer this type of service as a part of their education and training programmes. The majority of career orientation services assume independent orientation; however, personal counselling is of low volume and non-systemic. Those employed in the services provided by employment centres are required to have a qualification defined on the basis of the service; as a rule, higher qualification is required, and in certain cases work experience is also necessary. There are various forms of education and training to train counsellors (training courses, special projects and professional higher education training programmes).

In addition, the VET policy 'Refernet' refers to the career guidance project of the Vocational School Development Programme for 2003-2006. Flexible routes/trajectories for adult learning are promoted by the new VET system using modular training programmes. However, most tools and programmes are narrowly concentrated within urban environments, and adults in rural communities will generally find it difficult to access regular or high quality learning opportunities.

Quality assurance has been put in focus by the accreditation of adult education and training programmes. Programmes have been accredited since 2002, with the establishment of the Adult Education Accreditation Board (FAT) to administer accreditation programmes and institutions in a national context. The adult education contract and the activity of examination committees in education and training programmes also work on quality assurance.

Organisations that provide adult education and training are registered and monitored by the regional employment centres; the authorisation of employment centres is restricted to monitoring the programme's compliance with regulations. If deficiencies are disclosed, employment centres can impose a fine or – in case of serious problems – prohibit the continuation of the education and training programme. Since 2007, regional employment centres, in cooperation with local chambers of commerce-industry, have been monitoring the practical training section of the National Register of Vocational Qualifications (OKJ) VET programmes. The proportion of these profit-oriented NGOs that carry out educational activity and are in the possession of ISO qualification is increasing.

Another dimension is quality development of the VET system and its provision in accordance with the introduction of a new NQF in 2006 and the systemic adaptation of CQAF. Several areas and phases of quality assurance are in operation. It is a basic specification that adult education institutions have to enrol in a separate system of registration that involves mandatory rules of operation. The accreditation system of adult education institutions and programmes is the second tier of quality assurance and is not mandatory, but state-supported training may be provided only by accredited institutions. The quality of the content of the training process is ensured by the integrated professional and examination requirement system of qualifications included in the National Training Register - recognised by the state - and the integrated, independent examination system. Supported trainings courses are checked on a regular basis by regional labour centres and local labour agencies. Surveys on the demands of employers and their level of satisfaction, as well as the new career tracking system under development, serve the purpose of improving the content of the courses.

In the community outreach programmes, workplace learning is mainly developed with civic organisations trying to improve adult learning and labour performance through project-based development. However, it is almost impossible to shift good practice of such models into mainstream adult education or into VET-school programmes so as to promote partnership building with stakeholders. The country's strategy on lifelong learning is aiming to reach

social consensus by building partnerships and inter-sectoral co-operation to reach out to those major target groups in adult learning. However, most relevant programmes with such dimensions are mainly run by regional employment offices, regional training centres, and by some adult education and training SMEs and NGOs.

The establishment of Regional Development and Training Committees of the Regional Development Councils in the seven regions of the country has been an attempt to co-ordinate employers and stakeholders in local and regional VET programmes, and to support initiatives promoting adult learning funded by certain projects of the National Development Plan. The Chambers of Commerce and Industry have been trying to initiate the same kind of involvement of economic stakeholders. At the national level, some major economic stakeholders are members of the National Adult and Vocational Training Council, which supports the work of the National Institute of Adult and Vocational Training.

As far as the acknowledgement of prior learning is concerned, recognition of non-formal and informal learning became one of the most important elements of the National Lifelong Learning Strategy in 2005. The measures of the Education and Training 2010 programme has accelerated such measures in accordance with the OECD's RNFIL survey in 2006-08 to promote the recognition of non-formal and informal learning. Its revised document in 2009 stated that by having adequately modified the Public Education Act and Vocational Educational Act, the possibility is open for low-skilled adults to complete the 7th and 8th degree of primary school during two five-month learning periods. In this way their primary school attainment is acknowledged, which is important for their further studies and position in the world of work. Regarding guidance, the scope of supply has been enlarged by mentor activities for enrolling to courses, contracting, learning, etc. The original law is the 30/2000 departmental order of the Ministry of Economy, dated 15th September, for free-of-charge labour market services, which are given to 100,000 adults (who are mainly unemployed or in danger of losing their position).

Last year, a special project started at the National Institute for Educational Research (OFI) as part of the Social Renewal Operation Programme so as to help Hungarian Higher Education develop its validation system for prior learning (Programme 4.1.3). Its results will eventually influence the practice of recognition and validation of prior learning in national contexts.

Economic instruments mainly focus on financial incentives and tools trying to help adults in finding adequate learning opportunities. However, financial tools such as subsidies, vouchers, loans, saving systems and tax deduction, introduced in 2001-02, have been either cut or reduced as a result of economic difficulties and crisis situations. In addition, some of those effective tools have not yet been introduced or used effectively, in spite of the public demand to make use of such measures and incentives. Employers can still support secondary or higher education institutions in providing vocational and mainly practical trainings for young people and adults as a levy reducing tool. Also, employers can support the training of their employees by subsidising up to 33 per cent of the 1.5 per cent VET levy. In the case of micro and small companies this subsidy is up to 60 per cent of the 1.5 per cent levy..

The CONFINTEA VI report of Hungary emphasised that more coherent monitoring systems ought to be developed to assess adult learning processes at macro-level and through international comparison. In addition, data should be put into contrastive analysis at local and regional level, based on statistics and learning achievement and success figures. Another important monitoring dimension is the follow-up and monitoring of career paths and of the impact of learning achievements in the labour market.

Conclusions: most clusters of measures indicate that the issue of implementing accessible and relevant tools for mobilisation has become important for stakeholders of adult education and training stakeholders and for major providers too. However, the effectiveness

of such measures varies according to their planning, implementation and monitoring of use and cover-up of feedback.

6. The five priorities of the Action Plan on Adult Learning

6.1. Analyse effects of reforms in other educational sectors on adult learning

Adult learning and education surveys on Hungary come to the same conclusion: that it is the VET reforms which have a direct effect on the modernisation of the adult learning sector, especially on non-formal adult vocational and labour market trainings.

Responses to the EC Questionnaire on *Policy Developments – Adult Learning Sector 2008-09* indicate that the policy on adult education has not significantly changed in the last two years and the main policy objective is to increase responsiveness of training to labour market requirements. This determination is embedded in a series of modifications in law, in the structure of learning and development programmes, and through the modernisation of VET system and related training for adults to develop their practice-related knowledge.

The 2007 Ministry Report on the implementation of tasks referring to the Strategy on Lifelong Learning underlined the impact of the preliminary process of strategy building. It provided a more coherent approach to connect formal, non-formal and informal learning.

The Human Resource Development Operative Programme of the National Development Plan for 2004-06 prioritised lifelong learning and the principle of flexibility. The ‘New Hungary Development Plan’ aimed at developing lifelong learning through a better public education by giving more attention to raising the quality of basic skills and key competencies so as to cement learning for life. In addition, the plan targeted a more efficient system of quality assessment and assurance so as to promote education and to address local and regional differences in the quality of education and training. In order to develop access, segregation mechanisms in education ought to be eliminated, and schooling improved. Its Social Renewal Operative Programme targeted the modernisation of infrastructures of human services, for example through the development of IT systems so as to help lifelong learning programmes and labour market trainings be more adaptive and effective, on the one hand, referring to new learning needs, and, on the other, to help adult learners develop their basic skills and competencies in lifelong learning.

However, most surveys underline, according to CONFINTEA VI and Action Plan-related educational and training reforms, that:

- There are many difficulties with and obstacles to flexible learning paths and individual learning trajectories as an impact of low level permeability and underdeveloped support services for stabilising learning performance in crisis situations. These are due regularly to leaving one place and settling in another for dominantly employment and/or social reasons.
- Regulations of adult learning and education are dominantly system-centred rather than learner-centred;
- Adult learning and education programmes should be planned and developed as part of a social campaign so as to raise attention to quality learning. Active tools are needed to motivate learners to better performance and longer participation;
- New dimensions of adult learning and education should give way to inter-sectoral programmes and projects to generate co-operation amongst institutions and organisations promoting formal, non-formal and informal adult learning in non-traditional environments;
- It is essential to develop skills and the ability to learn in pre-schools and in primary education so as to prevent children and youngsters from leaving school early;

- Vocation-oriented and labour-market trainings for adults do not necessarily help to reduce social inequalities but, on the contrary, may deepen them. The government ought to take steps to balance these social differences;
- Another aspect of integrated development of education is the implementation of a more complex guidance and support system with a flexible and professional background of organisation;
- New reading and literacy programmes should be implemented to develop basic skills of adults;
- Non-governmental and civic organisations of adult learning and education should be given a more complex role to mobilise learning in adulthood and initiate voluntary actions for learning developments of adults by valuing, for example, third age learning actions.

The above listed points clearly reflect that the development of adult and lifelong learning are dominated by inter-sectoral issues and they should be promoted, from now on, by better and more co-ordinated co-operation across ministries on research, development and innovation. Social and economic policy reforms directly influence the status and promotion of adult and lifelong learning. It is worth analysing the impact of several public policy reforms on education and training, such as higher-education reform over the Bologna process, or the VET reform over the well-known Copenhagen process. There have also been public education reforms over curricula, teaching methodology and better guidance on learning to implement youth policies, employment goals, and social, cultural policies for better individual mobility and social stability. The direct usage and dominance of market-oriented rules and privatisation have not necessarily supported a more holistic understanding and use of adult education in the process of modernisation, but generally promoted a rather reductionist orientations for adult learning and education towards the labour market. It is one aspect why more accessible learning is needed to help the socially most disadvantaged, to enhance social cohesion and to promote the culture of a humanistic adult learning to raise participation, responsibility and voluntary actions of citizens with visible solidarity in learning towards underrepresented groups for a stronger mobility within the society.

In spite of several studies and reforms focusing on raising participation in adult learning, it is still difficult to measure concrete. There is a lack of convergence and co-ordination of major research and development organisations/institutions, while transparency, monitoring and follow-up of most adult education and training programmes are missing. In order to change such tendencies, more partnership with NGOs and civic groups is needed to open for a more coherent and supported package of reforms implemented through a bottom-up approach. This also needs a more effective use of resources, a more holistic approach and understanding of co-operation and sharing with practitioners. Finally a two-level analysis of actions and reforms is required to measure both local/regional learning actions and situations (e.g. cities and regions) over adult learning and to systematically relate to and disseminate practices of Europe-wide and international communities in order to promote better learning and more participation.

6.2. Improve the quality of provision and staffing

In Hungary, the quality of provision and staff is strongly attached, on the one hand, to registration and accreditation of adult education and training providers, and on the other, to the quality development of staff. The first issue is related to the process of raising the efficiency and professionalism of adult educators, teachers, trainers, facilitators, organisers, and administrative staff. This commitment is reflected through training initiatives and programmes for educators and other members of teaching staff in organisations developing

adult learning. There are different methods of accreditation for the training and re-training of teaching staff at higher education, public education and entrepreneurial sectors, according to law. The Social Renewal Operation Programme, since 2007, has implemented programmes for many teachers with ESA co-financing.

So far as the quality of staffing is concerned, adult education research and development projects have brought major European projects focusing on the professionalisation of adult education into focus. For example, the work of students on a number of projects – the European Masters in Adult Education (EMAE) project, and the TEACH and the AGADE projects – is used to promote the construction of a national curricula for the education and training of adult teaching staff with the Bachelor and Master programme in Andragogy. This training programme was introduced in higher education in the fall of 2006. It turned out to be highly popular and several hundred persons currently take part in such training at numerous universities.

The Hungarian CONFINTEA VI Report has also indicated that the conditions of employment and remuneration are not fixed in non-formal adult education outside the school system, though the rules of the Labour Code apply in the area. However, within the school system adult education employment and remuneration is subject to the provisions of the act on civil servants. Several areas and phases of quality assurance are in operation. It is a basic specification that adult education institutions have to enrol in a separate system of registration that involves mandatory rules of operation. The accreditation system of adult education institutions and programmes is the second tier of quality assurance - it is not mandatory, but state-supported training may be held only by accredited institutions. The quality of the content of the training process is ensured by the integrated professional and examination requirement system of qualifications included in the National Training Register - recognised by the state - and the integrated, independent examination system. Supported training courses are checked on a regular basis by regional labour centres and local labour agencies. Course content is improved with the use of surveys on the demands of employers and their level of satisfaction, as well as the new career tracking system currently under development. The results of these surveys are made public, and feedback is given to those generating them.

Another aspect of quality development is the impact of the construction and application of a National Qualification Framework, in compliance with the EQF. The newly framed CQAF mechanism also needs consideration, as it is applied in adult education and training programmes and innovations in connection with labour market expectations and new European VET principles. Also, one must underline the role of the Grundtvig programme's direct initiatives for the quality development of teaching skills, methodology, ICT-knowledge, professional language usage, etc. of adult educators, as represented by the Tempus Public Foundation. It is also important to underline the impact of actions of higher education institutions in Hungary, through the Hungarian Universities' Lifelong Learning Network – MELLearn. These institutions work to promote planning and the provision of adult education, and to improve the quality of training of adult teaching staff through professional training and conferences. They also produce publications to disseminate recent innovations in the field. Finally, it is worth making some recommendations in the area of quality development of adult education and learning:

- Despite the existence of a National Council on VET and Adult Education, there should be, amongst adult education organisations and their staff, a more systemic co-operation for networking in order to develop professionalism, commitment and motivation for the promotion of formal, non-formal and informal learning;
- It is essential to reaffirm and recognise new roles for adult educators with the use of innovative means of education and training;

- Organisations, associations for non-vocational adult education and learning ought to receive more space to help develop the culture of lifelong learning through attention paid to new learning spaces in local and regional environments.

6.3. Increase the possibilities to achieve a qualification at least one level higher

In recent years, there have been many programmes to raise the qualification levels of adult learners. The order of priority, therefore – partially in harmony with the European Union employment policy strategy – is determined by the labour affairs governmental body. This is decided partly in light of long-term national development plans and partly in the given budget year. In this respect the greatest problem is helping into employment those people with low school qualifications, or no skills. The basic first step is to provide them with vocational training. To assist this the Hungarian government – also making use of European Union funding – is now organising and realising special layer programs for the third year, with the title “One step forward/Step one ahead!”.

Some 2,000 or so adults strive for primary school attainment within the frameworks of EU granted learning and training programmes. “Step one ahead” (ESA) is an example, where a further 5,000 adults were assisted in completing primary schooling during the first two phases of the programme. The “Step One Ahead” programme is the 2.1.1 construction in the priority 2 axel within the Social Renewal Operative Programme. Its groups have so far consisted people without even eight grades or vocational qualification (or with only obsolete vocational qualification). The peculiarity of the programme is that it has preferred and involved around 20,000 adults as participants with similar chances and social status in the seven regions of Hungary in a rather deformed labour market with relatively high job shortage.

To sum up the school attainment of the two stages, when entering, eight per cent have not achieved eight grades achievement, and 42 per cent have not reached secondary achievement. (The Social Renewal Operational Programme (TÁMOP 2007-2013) of the New Hungary Development Plant contains measures supporting the integration of people with multiple disadvantages into the Labour Market. “Step One Ahead” is only one measure in the line of this targeted assistance.)

Simultaneously with the ESA-funded programmes, a large scale nationally-funded programme has been launched with the title: “Path to Work”. The target group is those under 35 years, who have not achieved the primary schooling certificate, and who are receiving social benefit. Its resource is the national budget and its objective is to help learners obtain primary school certificate and to gain key competences offered by nine regional training centres.

But regarding the whole age group it is worth noting that the indicator for upper secondary attainment of Hungary (83.6 per cent) is better than the EU average (78.5 per cent). In addition, the rate of low achievers for 15 year olds according to PISA results on the area of Reading, Maths and Science are better the EU-average. See the E.T.C.G Joint Interim Report Draft for 2010.

6.4. Speed up the process of assessing and recognising non-formal and informal learning for disadvantaged groups

According to the Hungarian CONFINTEA VI Report, one of the development goals to be realised in the field of adult education, amongst other issues, are the encouragement and recognition of learning in non-formal and informal settings, and the support of disadvantaged social groups, and strengthening of their motivation to learn.

On the one hand, the main target groups of adult education and learning have been identified in the CONFINTEA VI report in section 2.2.5. Also, the Hungarian CONFINTEA

VI Report pointed out, referring to major findings of recent adult education research, that the training of disadvantaged target groups requires special programmes. These programmes need continuous funding using state subsidies and European Union funds. Another solution is needed to provide incentives to these target groups to participate in training. Moreover, the training of disadvantaged target groups requires special methods which increasingly require planned development.

There are several examples of Hungary participating in development projects in the field of recognition, assessment and/or validation of prior learning. For example, together with 16 other European countries (among the 23 participants) Hungary has taken part in the OECD RNFIL survey in 2006-2008. Some of the findings and recommendations are:

- Recognition and validation is known in Hungary, but is not widely accepted (especially by university faculties). There is some progress, as recognition and validation of knowledge and skills are among the development targets at several education and training institutions. The basic question: is there a need for this in society? The answer is yes. This is mainly the case among adults who already have certain work experience but without school certificates - these are people who could best use recognition and validation of their achievements;
- The best examples are in the area of language certification and ECDL-examinations;
- The new modular and competence-based NVQR can become a strong pillar of the non-formal and informal recognition and validation system in the coming years;
- The former Hungarian NIVE (National Institute for VET) has had a trial project with 53 institutions. The test-paper variation seems to be the most realistic methodological pathway;
- Although a significant number of adults take part in non-formal and informal learning, it is still not considered it as a kind of learning activity being part of the traditional adult education and training set. Hungary is amongst EU-member countries with a low practice regarding RPL and VPL, however, certain elements of VPL are functioning in VET oriented training programmes in regional training centres.

Two new measures have arisen from what was stated in the OECD RNFIL review. By having adequately modified the Public Education Act and the Vocational Education Act, the possibility is open for low skilled adults to complete the 7th and 8th degree of primary school over two five-month learning periods and, through this way, their primary school attainment is acknowledged in reference their further studies and position in the world of work.

It is worth considering that the Hungarian Folk High School Society – HFHSS) published its findings on the Action Plan in 2008, and gave recommendations to the issue of recognition of prior learning of adults in the scope of the RNFIL process.

6.5. Improve the monitoring of the adult learning sector

The system of assessment of outcomes is being formulated now. On the one hand, processes have to be assessed at a macro level, and compared internationally as well as at regional, local and institutional levels. One source for assessment is statistics, measuring learning outcomes and success. The other area is career monitoring, with utilisation of outcomes in the labour market with a view on self-achievement. The third is the competence measurement of adults. New procedures will be prepared for each field under development projects with domestic and EU-support launched and realised in several phases until 2013. The VET sector and its adult training components are monitored through the newly developed CQAF model. Adult Education Accreditation implies a special monitoring of the field through the actions of the National Adult Education Accreditation Committee (FAT). Monitoring of the sector is also

undertaken by special sections of the Central Statistical Office of Hungary (KSH) and by the State Audit Office of Hungary.

However, the statistical methodology is heavily argued, referring to the validity of Eurostat figures on the Lifelong Learning benchmark (Adults' participation in lifelong learning), and the improvement of EURYDICE-based Eurybase-system needs further improvement and more attention from the members states' stakeholders and relevant ministries. Professional civic organisations and associations also monitor the field of adult education and learning in Hungary and their findings ought to be integrated into the overall picture so as to reach for a more realistic and concrete view upon practice and provision. More details at: <http://www.feflearning.hu/Home>

Further recommendations upon issues for development, in the field of monitoring and assessment, are the following:

- In Hungarian adult education, the process of accreditation should imply and foster professional guidance/counselling. Therefore, it is essential to establish local/regional professional advisory groups and/or regional centres who can provide ongoing development for practitioners in adult teaching and training;
- An advisory/mentoring network should be initiated in order to underline the impact of monitoring instead of assessment and control. This network may be able to provide and apply more coherent indicators to measure changes and challenges in adult education and learning in Hungary;
- There has been a significant number of EU-funded/co-financed projects operating in Hungary in the areas of adult education, VET and labour market developments, human resource development, social renewal development, etc. Therefore, an easily accessed and clearly structured database should be set up to collect good examples and best practices for better dissemination. Also, the start of the validation process of non-formal and informal learning is of high importance (Please find the project of the National Centre for Educational Research and Development - OFI and its detailed description on Validation in Higher Education at: <http://tamop413.ofi.hu/kvr-kozponti-validacios/projekt/index>);
- The latest survey findings of the Hungarian Folk High School Society on the diverse ways of adult learning ought to be integrated into the analysis of adult learning in Hungary. Please find more at: http://www.nepfoiskola.hu/MNT_hu/hogyan_tanulunk.html.

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Country report on the action plan on adult learning: Romania¹

1. Context

1.1. Synthesis of existing section and update

A peculiar impact upon adult learning and education has been the ongoing reform process of the education system since 1989 with the main aim to raise and improve school education with the extension of the education period, pushing back drop-outs to reach the EU-average, and to develop adult basic education and second-chance schooling, especially for Roma-groups in 1999 and afterwards. Adult and continuing education is a strong component of that system challenged by fundamental changes in domestic politics and in main socio-economic aspects with an influence of European and global trends too. On the other hand, the current situation of Romanian adult learning and education has been influenced, partially, by tradition and historic routes of institutional and community-based developments of learning for/of adults.

1.2. Socio-economic context

In the case of Romania, the socio-economic context is rather paradoxical, whereas main figures upon GDP and that of unemployment reflect that the country is slowly catching up, however, real trends, for example the participation of adults in lifelong learning, indicate that there are rather severe problems mainly in social contexts and significantly vary regions by regions. According to the CEDEFOP Report on VET for 2009, Romania, after 1989, experienced economic problems, followed by economic reforms such as low flat tax rates in 2005. The country joined the European Union in January 1, 2007. While Romania's income level remains one of the lowest in the

European Union, reforms have increased the growth speed. In the past two decades Romania has been going through a thorough transformation, resulting a process which is rather complex and hectic, yet it is strongly depending on economic and political 'pendulum-effects' to stabilise systems of finances, public administration, planning and development through regions, etc. The Romanian society, therefore, is to follow an ongoing reform and transformation to result in severe crisis at social, personal and, eventually, at economic forms. Also, there is a confused change of values, ethics and beliefs with a turbulence of attitudes and mentalities. Demographic figures for the former socialist countries, like Romania, signal that the social and economic transformation is followed by the fall of the number of people, however, it is also influenced by the unequal availability of welfare, the trends influencing mobility and migration in Europe and of the rising feelings of confusion or frustration.

The CONFINTEA VI. Report for Romania indicates that the decrease of the population will be of 11%, according to Eurostat surveys, and that the Romanian population is seriously ageing by 2050, like in most economically advanced western-type economies and their societies, and that the unemployed retired ratio is growing rather fast.

This issues are real problems according to which national programmes try to improve active life/active ageing, with an attention to urge older people to re-enter the labour market and community life.

The CONFINTEA VI. Report for Romania underlines the impact of external migration and that of the mobility of the workforce towards Western Europe, whereas the European accession made significant part of the economically active population to move for employment in better-paying jobs in other (mainly former EU-15) Member states with a

¹ This paper was written in October 2010

consequence of sectors like construction, tourism, health and some others struggling with the lack of human resources in the labour market.

Romanian economy has turned into a market oriented open economic structure and, by entering into the EU, Romanian economic and social policies are, therefore, using national programmes involving adult education to help economic regeneration, reducing high unemployment rate through social policy, and to help balancing economic interests and social needs for stability. The dominance of labour market oriented programmes in adult education has, in the last ten, fifteen years, has undervalued the traditionally culture-oriented programmes and traditional places of adult learning and strengthened formal and non-formal education and training/professional trainings for adults with the concrete aim to improve access and participation, counselling, valuing prior learning, improving quality with quality tools, using ICT, and better links with work/work-based environment/stakeholders.

Another aspect of such trends is the change in professions and the emergence of new job profiles. The slight growth in the use of ICT, PCs, and other electronic devices have accelerated relevant trainings and specific skills development and upgrading. However, the issue of new skills and new basic skills, according to the White Paper on Education and to the Memorandum on Lifelong Learning, put adult education and learning helping adults, especially those over 35 years, with basic illiteracy or functional illiteracy, to join in educational and training programmes, but for whom changing through learning was rather difficult especially in the case of being unemployed or retired. Simona Sava is using the term “learned helplessness” as a major barrier for those looking for a job and being unsure whether getting it or not.

1.3. Historical-ideological context

Romanian adult education has a long and colourful tradition and history in Romania. The first significant institutions created in the second half of the 19th century focused on raising the ‘cultural level of the people’, especially in rural areas. They continuously tried to educate more and more people and, also, disseminate professional knowledge to people, mainly to peasants. Local schools were also involved in adult education activities, therefore, by being a centre for education, it became a centre, dominantly in rural areas, for the instruction and culture for adults. On the other hand, practical adult education was far more advanced than any early theoretical construction trying to describe the education and learning of adults in the same era. Ideas about education were mostly implicit to reflect practical actions, and most of them were linked to national, cultural, and egalitarian ideals which became rather popular in the second half of the 19th century. Modern ideas upon adult education and adult learning were theorised from the beginning of the 20th century strongly influenced by psychological and sociological approaches in the science of education.

The Romanian Social Institute (RSI) was founded by Dimitrie Gusti to promote and develop sociological research with a more evident empirical character. In line with that approach, Gusti and his colleagues considered the rural cultural centres as basic model for educational development according to Grundtvig’s folk-highschools.

People’s Universities were created by the evolution of educational and cultural associations into a this format which directly oriented itself towards adult education in the first half of the 20th century after World War I. The first such University started in 1922 by Nicolae Iorga who supported the establishment of and initiated cultural and educational developments and activities to educate rural adult population.

After World War II., adult and continuing education was soon dominated by vocational aspects and, secondly, by socio-cultural institutions’ activities to organise leisure

activities combined with education and training, for example, in the frame of the cultural-scientific universities from the 1960s and onwards.

In recent times, adult education has become a well-developing and changing part of the educational system. However, adult education was, until 1989, a mass centralised system and was developed for cultural reasons with strong ideological background. After 1989, changing this system into market-orientation with decentralised and flexible characteristics was a major issue. On the other hand, recent changes until 2000 reflected the lack of governmental plans, structural actions to prevent incidental moves and undecided responses upon challenges of the market economy and democratic society turning into a new social, economic and political system. In the last ten years, government actions shifted towards strategic development with more coherence. Most actions have been trying to promote professional education/vocational education and training to tackle unemployment and to respond to key challenges of the labour market.

One must recognise, according to Sava, some identical steps in recent history of adult education in Romania:

Decreasing preoccupations in between 1990 and 1993 in the time of searching for ways out of general chaos in an upside-down system and longing for a coherent policy. Adult education was almost 'forgotten', and there were only some minor changes made in order to prevent the system of adult education from radical reform. However, almost half of the Adult Education institutions of the Ministry of Education were closed;

In between 1993 and 1997, a phase of rebuilding can be identified with a search for efficient AE strategy. The state has set the frames for a new and decentralised educational and training environment, however, limited financial tools and incentives and bad economic turn-outs of a transitory society undervalued adult and continuing education. The system of adult education could change and develop in a free way and became rather fragmented, therefore state regulations could hardly affect each and all sectors of it.

It is rather peculiar how, and in what ways international co-operation helped a new dimension of adult education to develop, mainly through the help of DVV International and its Bucharest Bureau. The Romanian Association of Peoples Universities and Cultural Houses (ANUP) used the German aid of DVV International, and later of Danish adult education organisations, to develop a country-wide networking in adult education with more than 80 member institutions to co-ordinate ministry-led developments and actions.

At the same time, the Ministry of Labour and Social Care (MMPS) started to invest into programmes and to the creation of new labour-market further education and training institutions, to train the unemployed, reintegrate disadvantaged and/or marginalised people. The Ministry set up 14 regional centres – agencies for continuing professional development to indicate that professional career development would be the fast-growing area of adult education. On the other hand several civic organisations, NGOs started to function so as to offer further education.

Serious development started in 1998, after CONFINTEA V took place in the summer of 1997 in Hamburg, when the Ministry of National Education (MEN) opened interest towards adult education. Therefore, a National Council for Continuing Education and a National Office for Distance Education were established in 1998 to help a strategy on adult education be formulated. The establishment of the Romanian Institute of Adult Education in 2000 at Western University of Timisoara was established to promote research in adult education and a common theoretical basis be established through various publications. Also, the government intended to initiate, after 2000, the standards for evaluation of adult education providers. The National Agency for Evaluation and Occupational Standards and the National Council for Evaluation and Academic Accreditation support those efforts.

Another key issue having been targeted by adult education development is professional development of adult educators. In order to help quality learning to develop, it is essential to develop training the trainers and managers for better adult education and training. German and Danish support and initiatives towards project-based research and development/innovations have moved towards such dimensions, like, for example, in European Union funded Erasmus and Grundtvig schemes.

2. Political and legal framework

According to the CONFINTEA VI Romanian Report on adult learning and education, Romania has not yet produced a national integrated strategy for lifelong learning, however, the CONFINTEA VI report gives concrete details upon the main obstacles Romania has been facing to adopt an integrated lifelong learning strategy.

Since 1997, there has been more interest amongst stakeholders and decision-makers to develop and implement such a strategy. In the same manner, a working group was set up by the Ministry of Education and Research, including representatives of ministries and social partners, to develop a national integrated strategy on lifelong learning. This group has drafted a national lifelong learning strategy.

The draft of the strategy under debate is designed to offer an overview of lifelong learning issues for all components and levels of education and training, taking also into account non-formal and informal education contexts. The draft strategy also takes into account educational aspects which traditionally have not been included on the lifelong learning agenda in Romania, such as: early education, education in family, education through mass-media, education for democratic citizenship, training in enterprises, initiation into ICT and developing language skills.

Objectives set with regard to lifelong learning:

The draft lifelong learning strategy recommends the following general priorities:

- Ensuring access to education and lifelong learning;
- Extending learning to cover all fields of life;
- Developing competences related to a knowledge economy and society;
- Developing institutional capacity for lifelong learning.
- Following the process of consultation with all stakeholders these priorities are expected to be subject to some changes in the near future.

Main principles and objectives of the planned strategy are included as priorities in other important strategic documents for development.

From the Adult Learning and Education provision point of view, the Ministry of Education, Research and Youth is responsible for initial and continuing training of the teaching staff; provision of CVT courses by the schools; management and coordination of the “second chance” programme. Different central authorities are responsible for the CVT in specific sectors and the institutions which are allowed to provide training are established by law (for example, Ministry of Health for the CVT of medical staff; National Archives for the CVT of archivists, etc.). The National Adult Training Board is responsible for the accreditation of the CVT providers and of the competences assessment centres. Other governmental responsibilities regard the education of the adult population on different aspect: health, environment protection, safety on the work place, etc. In some sectors there are regulations regarding the content, duration and/or periodicity of the needed training for different occupations.

In the preparations for a strategy for lifelong learning in the last 5 years, Romanian experts on adult education have recognised some key issues affecting a successful

implementation of such strategy because of the heavy issues signalling urgent tasks around. Those issues are:

- Low participation rate in lifelong learning amongst young people and adults;
- Neglecting/undervaluing learning outside the institutional framework (non-formal and informal learning);
- Differences in the opportunities and educational resources between rural and urban environments (The centralisation of education and training institutions)
- The problem of integration and inclusion so as to fight back exclusion of people, like the poor, inmates, people with learning difficulties, Roma population, etc.)
- Limited access to ICT, digital information-networks, and the issue of the low-skilled

The Policy Developments report for the Adult Learning Sector/Romania indicates areas of action in its Annex referring to the Draft National Strategy for Lifelong Learning:

- 1.) Ensuring access to education and lifelong learning;
- 2.) Extending learning to cover all fields of life;
- 3.) Developing competences related to a knowledge economy and society;
- 4.) Developing institutional capacity for lifelong learning;

Concerning the legislative framework, there is a special chapter within the Law of Education no 84/1995 dedicated to the permanent education, and the Law no 133/2000 focuses on the organisation of the permanent education programmes through the educational institutions stipulating that these programmes have to ensure:

- compensatory education (“second chance” education);
- continuing vocational training;
- civic education;
- personal education for playing an active social role.

The Romanian Eurybase Report calls that above-mentioned Law as ‘Special Law on Lifelong Learning’.

Nevertheless, the different aspects of adult education, excepting the continuing vocational training, are not subject of coherent strategies, policies and specific regulations. The legislative framework (laws, government ordinances, government decisions, and orders of different ministers) regarding the continuing vocational training (CVT), consists of:

- Government Ordinance no 129/2000 of adult vocational training, modified through the Law no 375/2002, which stipulates:
 - the criteria and procedure of quality assurance of CVT programmes;
 - the competences based training, assessment and certification;
 - the assessment and recognition of the competences acquired within nonformal and informal learning contexts;
- Labour Code (Law no 53/2003) regulates the training within enterprises and stipulates the obligation of the companies to train the personnel every two years (every three years for SME);
- Law no 76/2002, modified through Law no 107/2004 and Law no 580/2004, of unemployment insurance system and stimulation of employment, stipulates the passive and active measure against unemployment;

- Other regulations concerning the training at sector level. German Popular Universities Association – DVV-International – supports cultural and educational institutions in Romania – cultural houses, popular universities, cultural centres, cultural establishments, regional centres for adult education, as well as state-owned and private schools and universities since 1993.

In 1994, DVV International brought together for the first time representatives of the government, civil society, unions and employers associations in order to coin the phrase “adult education” and lobby the Romanian Parliament with a view to having it introduced in the current legislation. As a result of this initiative, in 1995 adult education was defined as a separate educational activity in the Law of education.

In 2003 the debates which were originated during the workshops organized by DVV International helped drafting The Law no 292/2003 on the organization and functioning of cultural establishments. This law defined the purpose of such cultural establishments (community centres, cultural houses, popular universities, popular vocational schools, cultural centres, regional and county centres, and the national centre for adult education), namely to “preserve and promote traditional culture”.

3. Structural and financial framework

In Romania, adult and lifelong learning principles have been included as priorities in education, continuing training and employment policy documents in line with major EU-recommendations.

Recent considerations about lifelong learning in Romania mainly orientate on completing a national coherent and legitimate strategy be accepted by all stakeholders, including social partners. In this respect, according to an initiative of the Ministry of Education and Research, a working group was set up with representatives of all ministries and social partners to co-ordinate consultations to help achieving a national integrated strategy. In the meantime, the work group has already drawn up a draft of national lifelong learning strategy. Debates and inter-institutional consultations are currently being held to complete the strategy. Regardless of many laws dealing with either continuing education or compensatory education, continuing vocational education, and civic/personal education, different aspects of adult education, except for continuing vocational training, are not subject of coherent strategies, policies and specific regulations.

Main stakeholders are listed at point A.), which reflects some ministries dealing with education and training or related policy issues as financing, employment, and the integration of civic bodies being interested in quality education, training and learning, in broadening access, expanding the scenario of equal opportunities and incorporating the sectors of non-formal and informal learning. Officially, each listed stakeholder is important, but those ones I listed who are definitely involved in the development of adult learning and education.

A) Main stakeholders involved in the realisation of lifelong learning policy/strategic development are:

- MERY Ministry of Education, Research and Youth (Ministry of Education and Research)
- MPF Ministry of Public Finances
- MLFEO Ministry of Labour, Family and Equal Opportunities (Ministry of Labour, Social Solidarity and Family/Ministry of Labour and Social Solidarity)
- NAE National Agency for Employment
- NAQ National Authority for Qualifications
- NATB National Adult Training Board
- NCCET National Council for Continuing Education and Training
- NIS National Institute of Statistics

- National Observatory for Employment and Training
 - Social Partners
 - Institutions/organisations dealing with culture (for example: museums, libraries, popular universities, houses of culture, popular vocational schools, cultural centres, regional and county centres, etc.)
 - Higher Education Institutions - either running adult education programmes at bachelor, master and/or PhD level, or having organisational bodies (department, institute or centre, etc.) researching, developing, innovating adult learning and education and/or lifelong learning (e.g. at the universities of Timisoara, Iasi, and Cluj)
 - Chambers of Commerce
- B) Other stakeholders involved in other important strategies/ policies affecting the adult learning sector:

It is worth mentioning two main institutions promoting and managing professional trainings for adults:

- The National Agency for Labour Force and Occupation dealing with government funds for training the unemployed and trying to realise the National Plan for Employment within its institutional and county network.
- The National Council for Adults' Professional Training (CNFPA) and the Council for Occupational Standards and Accreditation which merged with CNFPA to become the National Authority for Qualifications. CNFPA is responsible to outline and implement the Romanian NQF.

Financial schemes involved in adult learning in Romania:

- Public investments in adult learning and education:

According to the CONFINTEA VI. Report on ALE in Romania, one of the most significant financing tools in adult learning and education is the Unemployment Insurance Fund (UIF). The main target group of programmes and initiatives being funded by UIF is jobseekers. Also, UIF funds enterprise-based trainings.

The National Agency for Employment represents a heavy amount of financial input into VET so as to support active measures against unemployment in 2008 to grow with a 6%. Adult learning and education for teachers is financially covered by the government's public funds, participants' input, and, also, by European funds too.

So far as the cultural sector is concerned, local administration/government is responsible for financing the activities of cultural institutions, including adult learning and education activities. These activities depend on available resources of local authorities and their commitment towards the sector. However, statistical data show at <http://www.cppc.ro>, that the main reason why only a limited number of organisations can benefit from trainings is the reduced sources of financing

- Foreign funds and multilateral investments in adult learning:

The European Union supports Romania by being its full-member, there are several programmes to help the development of adult education through the PHARE programme, as an example, to train members of teaching staff in TVET, sectoral experts of validation of occupational standards, etc. The EU and some member states supported, by various projects, the sectoral committees to prepare for performing their responsibilities in NAQ, in special areas if industry, etc.

DVV International and its Bucharest Office offered financial support on behalf of the Federal Ministry (BMZ) for economic co-operation and development so as to promote adult education in various areas so as to concentrate on disadvantaged groups.

- Private/Corporate Sector sources:

The Labour Code stipulates the obligation of the employers, to train the employees every two years (or three, for SMEs), but not all the employers respond to this obligation. EUROSTAT survey CVTS2 (2002), conducted in enterprises by the National Institute of Statistics with 1999 as the reference year, shows that, on an average, Romanian enterprises spent for each employee with 3 times less than the EU member states average. In many situations, the responsibility for training is “transferred” by the enterprise to the employee. There is no data concerning the value of individuals’ contribution for assuring their own training. A similar survey to European level was carried out in 2006, relying on the data collected in 2005, and the results show that the discrepancy between Romania and EU27 maintains approximately to the same level (average cost of CVT courses/by participant represented 0.3% from the average cost of CVT courses at EU27 level).

In spite of periodical discussions on the necessity to raise sectoral training funds, there are not enough will and capacity of the social partners to implement funding mechanisms for CVT at sector level. The National Tripartite Agreement on the National Qualification Framework is under revision, including the aspects related to CVT and sectoral committees funding. The CVT measures are eligible under ESF, but the capacity of enterprises to access ESF needs to be improved.

- The support of the civil society:

Co-operation between MERY and NGOs, public and intergovernmental bodies to run projects for ROMA people (e.g. Romani Crisis, Partida Rromilor, PER, CRCR, ANR, etc.)

- Recent developments and trends in financial schemes:

Financial support for adults participating VET programmes is regulated by the law on adult training (Law 375/2002 approving and amending Ordinance of the Government 129/2000) and the employment law (Law 76/2002 amended through Law 107/2004).

For the period when the employees participate in training programmes financed by their employers, the employees receive wages stated in their contract!

4. Problems and opportunities for participation in adult learning

Main problems for participation of adults in lifelong learning in Romania are:

It is worth recognising that in most countries of Central Eastern Europe, like in Romania or Hungary too, the problems affecting proper and continuous participation in adult learning is a mixture of presence of institutional, situational and dispositional barriers in most adults’ lives. However more concrete problems blocking successful adult learning are the followings most relevant documents point out:

- A radically, and dominantly changing time-consumption towards the media;
- Rural and remote living environments with the lack of or with poor/traditional adult learning possibilities by NOT supporting participation to grow in mostly culture-house formats;
- A significant fall of the number of institutions of adult and continuing education and of offers in general adult education
- State/regional/local support for non-formal education is missing, therefore, most institutions are depending on the local authorities and financed by local and/or regional public administration bodies. Also, most adults are not encouraged to participate political, civic and personal development education and trainings; There is a rather ‘reductionist’ view upon adult education in national policy to focus on working-skills instead of life-skills’, while strategies for social inclusion and for the regeneration of the community is far behind economically led programmes and projects;

- Vocational adult and continuing education to dominate public funds and programmes with a defined orientation of public policies on tackling unemployment;
- Limited resources and financing of employers in continuing professional development, as most employers can select from already trained people, on the other hand, most of them are SMEs NOT having reasonable budget allocated or interest shown for employee-career developments;
- A rather low income rate and dominating working-time of the average adult to result in the falling back or diminishing leisure time/free time for learning;
- Society is mainly weak with mostly weak NGOs in the field of education or in areas where adult learning would simply help strengthening initiatives like environment, youth, civic/human rights, etc. Also, trade unions are indeed weak or not necessary considering adult learning as an important task to get involved for development;
- Romania is representing an high rate of migration, today over 4 million people to be outside the system, therefore, excluded fro participation;
- Finally, the mentality of many adult wanting to 'stay at home' instead of personally participating programmes wanting change, or trying changing life and attitudes, mentality.

In case any of those barrier listed above may not appear in one's life, it could be seen as an opportunity for adult learning!

Some reasons behind problems reflected as barriers, according to CONFINTEA VI Report, are poverty, unemployment, the status of women in education - labour, young people's situation, Roma ethnics' issues, learning disabilities of some people, being unemployed beyond the age of 45, living in remote, rural areas lacking education and training facilities, low income, imprisonment of/for some people, long military service, etc.

Another issue, which was described at barriers of adult education provision, is the deformed system of adult and continuing education and training being represented by the dominance of formal and non-formal labour-market programmes, VET-based programmes which are considered worth supporting instead of non-formal and informal adult learning programmes to develop skills other than those ones directly connected to work.

However, the most important opportunities in adult learning are organised and financially supported programmes which are mainly available in urban environments, being considered as part of educational, and/or employment policy tools. The opportunities are realised through the provision described at previous points, yet one may conclude that the biggest opportunity is existing motivation in learning either internal or external. If one has such motivation, it is an opportunity itself.

5. Clusters of measures

Mobilisation strategies (methods and tools) are reflected in the draft strategy on lifelong learning, and, more precisely, in the Sectoral Operational Programme Human Resources Development– SOP HRD.

- The still draft strategy on lifelong learning indicates educational aspects which traditionally have not been included on the lifelong learning agenda in Romania, such as: early education, education in family, education through mass-media, education for democratic citizenship, training in enterprises, initiation into ICT and developing language skills.
- The general objective of SOP HRD is the development of human capital and increasing competitiveness, by linking education and lifelong learning with the labour market and ensuring increased opportunities for future participation on a modern,

flexible and inclusive labour market for 1,650,000 people. Its specific objectives can be summarised as follows:

- Promoting quality initial and continuous education and training, including higher education and research;
- Promoting entrepreneurial culture and improving quality and productivity at work;
- Facilitating the young people and long term unemployed insertion in the labour market;
- Developing a modern, flexible, inclusive labour market;
- Promoting (re)insertion in the labour market of inactive people, including in rural areas;
- Improving public employment services;
- Facilitating access to education and to the labour market of the vulnerable groups.

Instruments being recently used to increase participation:

In order to support information accessibility, the National Register of Accredited Training Providers for Adults is updated and published through the Vocational Training Portal: <http://portal.mmssf.ro/Portal>

The Ministry of Education, Research, and Youth with its Centre Education 2000+ programme and programmes to help prisoners has meant to give adults the opportunity to leave behind illiteracy and complete their primary and secondary education.

Romania is advancing in the area of accreditation and validation of prior learning as it has set up a national agency and its network to promote such activities with an identical approach being developed opposite to many countries' status in that field in Central-East Europe. As it was previously indicated, validation of prior learning has been regulated and implemented within the CVT (Continuing Vocational Training) system. The competences assessment centres are accredited by the National Adult Training Board.

In the accordance with increasing participation, another important issue is better career guidance and counselling. The two most known networks in this field are the Network of educational services and the Network of employment services. On the other hand the so-called Probation Centres also offer guidance and counselling, together with the Youth Agency. The CONFINTEA VI report lists some major guidance and counselling services in employment and in youth affairs at Point. 2.2.4. (Romania – CONFINTEA VI National Report on the Development and State of the Art of Adult Learning and Education (ALE), p. 31.). The guidance and counselling services in the employment area are the following:

- EURES - The national network of services was established (<http://www.anofm.ro/eures>). The National Agency for Employment offers services of work mediation as a member of EURES20. Partners of public services within the network are trade unions, private organizations and also different actors on the labour market. The European Commission coordinates the network.
- During 2004-2008, the National Agency for Employment established 8 pilot centres in the 8 Romanian regions through a national programme called “Services for people with special needs”. Within next years, the network should be extended to 42 centres, one in every county.
- The “Information and Career Counselling” project (financed by the World Bank) had good results during 2005-2008: 100 new occupational profiles have been elaborated; practitioners participated in training sessions for using the occupational profiles as well as for using the Jackson Vocational Interest Survey; the portal for counsellors working in the employment area is under construction.

- The National Agency for Employment organised job fairs targeting at different beneficiaries: graduates, Roma people, social marginalised people who could benefit on guidance and counselling services during these events. In 2007 a national project was developed in rural area and in Roma communities.

Guidance referring to employment is represented by EURES, NAE's 8 pilot centres to promote programmes for people with special needs, the 'Information and Career Counselling' project and, also by job fairs.

One of the key issues in this field has been to enhance access to learning and the creation of learning opportunities for people with special needs, especially the Roma minority, and with social and economic disadvantages. These groups have been supported by special programmes of the Ministry of Education, Research and the Youth, MERY.

Again, it must be underlined that, according to report on Romania, that significant initiatives have focused on people from rural areas to promote participation in education and training.

On the other hand mass campaigns for learning is related to the 'Adult Learners' Week' that is called "Festival of Your Chances".

One of the main areas for action refers to the improvement of the quality of human resources available in rural areas aiming to increase participation in education, improve school performance, encourage participation in further education at higher levels and fight social exclusion. Other measures dealt with the adult population from rural areas and were intended to encourage participation in education and training, such as the training programmes for people from rural areas run by the public employment services (approximately 15,000 people in 2006).

The National Agency for Employment provides, free of charge, from the Unemployment Insurance Fund, vocational training courses for people who perform activities in rural areas and do not have any income or the income is lower than the unemployment benefit and are registered by NAE, in order to acquire the needed competences for facilitating their access on the labour market.

Thus, in 2007, NAE organised vocational training programmes for 21.147 people who perform activities in rural areas (out of which 20.992 unemployed people). Another disadvantaged group is that of the Roma population, who benefited in 2006 from specific programmes promoted by public authorities (Ministry of Labour, Social Solidarity and Family, Ministry of Education and Research, National Agency for Roma, National Agency for Employment), civil society or external donors (European Union, Roma Education Fund, World Bank, etc.) who encourage participation in education and training.

The Romanian Government has adopted, through the G. D. no 430/2001, the Strategy for improving the Roma situation, and the National Agency for Employment has been actively involved in its implementation.

6. The 5 priorities of the Action Plan on Adult Learning

6.1. Analyse effects of reforms in other educational sectors on adult learning:

Recent surveys have clearly reflected that adult learning and education has been strongly influenced by reforms in public education, VET and Higher Education. Their effects are bound to issues like quality development of curricula, methodology, counselling, teaching and learning skills in order to help a coherent strategy for lifelong learning get realised. On the other hand, adult learning has been hit by severe economic and social challenges to make participation of adult in learning decrease. Most reforms in Romania influencing adult learning and education, in the last 15-20 years, have been connected to economic, social and political changes which require the improvement of skill, competence, and vocations.

However, major national and European reforms on the quality development of education and training, according to ET2010, are implemented in several other areas of education, training and human resources development which affect adult learning:

From 2007, after the accession of Romania to the EU, the CVT measures and other ALE measures have become eligible under the European Social Fund in compliance with the Sectoral Operational Plan Human Resource Development (SOP HRD).

For example MERY has recently developed and submitted 33 project to be financed from the Structural Funds; the projects will be implemented over 2-3 years and they aim to attract children, youth and adults from disadvantaged groups in all school cycles. Other ministry-based programmes have mainly targeted improving the participation of adult learning of disadvantaged groups with an aim of better learning performance.

Starting with 1997, Romania also benefited from the financing through the European Community programmes in the field of education and vocational training, i.e. Socrates, Leonardo da Vinci (until December 2006) and Lifelong Learning (in the present), managed by the National Agency for Community Programmes in the Field of Education and Vocational Training (NACPF EVT)¹⁵.

Leonardo da Vinci contributed to the improvement of the vocational training through transnational cooperation projects. The former Socrates and now LLP, the Community programme for cooperation in education, has two different components addressing the adult education aspects: Comenius and Grundtvig.

As far as Comenius is concerned, there is one sub-component that allows for teachers involved in school education to attend in-service training courses abroad, organised by training centres in EU countries.

Beyond the figures, Socrates, Leonardo da Vinci and Lifelong learning Community programmes have been – and are also in the present – an important instrument, for Romania, to:

- develop the European dimension in education and vocational training at all levels or types;
- improve the quality in education and vocational training;
- promote the cooperation between education and training bodies from Romania and the other EU countries.

6.2. Improve the quality of provision and staffing:

There have been several programmes and projects for the improvement of quality of provision and staff. First of all, one must refer to some recent projects related to the development of provision:

- Developing continuing training for staff in pre-university education”
Phare RO 2004/016-772.04.01; Phare RO 2005/017-553.04.01;
Phare RO 2006/018-147.04.01

The overall objectives of the project were:

- To facilitate the access to quality education of students in rural areas, to diminish the drop-out rate and to stimulate students to continue their studies, in higher

- secondary and in higher education, by developing the training capacity and better linking the educational offer with the specific requirements of communities.
- To increase the stability and quality of the labour force (teaching staff) in the rural areas
- To contribute to increasing social and professional inclusion of students by stimulating their active participation in school and community life.
- Phare TVET RO 2006/018-147.04.01.02.01.03
 - The results of the project focus on developing the system capacity to sustain the distance learning as an alternative allowing higher rates of adults participation in training, continuing the assistance in the use and development of QA instruments and raising the capacity in regional management of HRD.
- Grant Scheme - Promoting LLL for qualification and requalification of the work force RO 2006/018- 147.04.02

The specific objective of this open call for proposals is the promoting life long learning (LLL) in Romania and developing of labour force to become more adaptable to structural changes, with focus on qualification and re-qualification of the work force in order to make it more respondent to the evolving needs of the labour market.

So far as adult education staff development is concerned, The Romanian training systems for adult educators envisage both initial and continuing vocational education.

The initial education refers to:

- the compulsory course on “Adult Education (AE)” provided for students learning within Educational Sciences Specialization Departments, from Faculties of Psychology and Pedagogy. It is a one semester course, an introduction in the AE topic, having the aim to offer students a general view in this field: concepts definition; the relevance of AE in nowadays society; action areas in AE; the specific of teaching, learning and evaluation in AE; the structure of AE in Romania;
- the optional course on AE offered by the Universities’ Departments responsible for initial and continuing teachers’ training (DPPD);
- the Master programmes in AE provided by the West University of Timisoara and “Al. I. Cuza” University of Iasi, University of Bucharest, etc. on counselling, programme developers and evaluators. (More details in the CONFINTEA VI report!)
- According to the responses to the EC Questionnaire on Policy Developments – Adult Learning Sector 2008-09, the continuing vocational training for adult educators/trainers considers the following possibilities:
- an every five years further development training programme for teachers up to secondary education level offers an optional course of AE Psycho-pedagogy, aiming to enable them to interact with indirect target group (adults, especially parents); this training programme is supported by the Ministry of Education, Research and Youth through the National Centre for Staff Training in Pre-university Education (NCTPE) up to secondary education level;
- training programmes for trainer and trainer of trainers offered by training providers nationally authorized by the National Adult Training Board, either public institutions and private organisations, companies or NGO’s.

6.3. Increase the possibilities to achieve a qualification at least one level higher:

According to the CONFINTEA VI Report and other relevant ministerial responses to the EU, In the field of adults’ training, the Law no. 107/2004 which changes and completes the Law no.76/2002 on the unemployment insurance system and the stimulation of employment creates training opportunities for new disadvantaged groups. The main disadvantaged groups benefiting of public support through vocational training are: long-term unemployed; women;

young people; Roma ethnics; people with disabilities; unemployed aged over 45; sole family supporters; people carrying out activities in rural areas without a monthly income or with a monthly income lower than the unemployment benefit and who are registered at the employment agencies; people returning to work after the two-year maternal or paternal leave, or a three-year leave in case of a child with disability; people returning to work after the completion of military service; inmates who have at most 9 months until the end of imprisonment.

The National Agency for Employment facilitates the access to training for people having difficulties on the labour market. Statistics on the participation in training of the unemployed people, by sex, age, education, and disadvantage groups are presented in the tables below.

According to the statistics most of the trained people are young people under 25-years-old and between 25 and 34 years old; this category is easier to be integrated on the labour market. The fact that a significant number of young people are registered to NAE's database and participate in vocational training indicates that:

- their initial training is not in accordance with the labour market's needs;
- young people accept more easier to participate in training and to change their initial qualification.

On the other hand, people over 45 years old demonstrate a lower flexibility, hardly participating vocational training and acquiring of a new qualification. As NAE organises qualification courses only for the qualification level 1, 2, and 3, the participation in training is significantly higher for unemployed people with secondary or upper secondary education.). One of the main areas for action refers to the improvement of the quality of human resources available in rural areas aiming to increase participation in education, improve school performance, encourage participation in further education at higher levels and fight social exclusion.

Other measures dealt with the adult population from rural areas and were intended to encourage participation in education and training, such as the training programmes for people from rural areas run by the public employment services (approximately 15,000 people in 2006).

The national Agency for Employment provides, free of charge, from the Unemployment Insurance Fund, vocational training courses for people who perform activities in rural areas and do not have any income or the income is lower than the unemployment benefit and are registered by NAE, in order to acquire the needed competences for facilitating their access on the labour market.

Thus, in 2007, NAE organised vocational training programmes for 21.147 people who perform activities in rural areas (out of which 20.992 unemployed people). Another disadvantaged group is that of the Roma population, who benefited in 2006 from specific programmes promoted by public authorities (Ministry of Labour, Social Solidarity and Family, Ministry of Education and Research, National Agency for Roma, National Agency for Employment), civil society or external donors (European Union, Roma Education Fund, World Bank, etc.) who encourage participation in education and training.

6.4. Speed up the process of assessing and recognising non-formal and informal learning for disadvantaged groups:

Different aspects of adult education, except continuing vocational training, are not subject of coherent strategies, policies and specific regulations. The legislative framework (laws, government ordinances, government decisions, and orders of different ministers) regarding

the continuing vocational training (CVT), consists of:

Government Ordinance no 129/2000 of adult vocational training, modified through the Law no 375/2002, which stipulates the criteria and procedure of quality assurance of CVT programmes, the competences based training, assessment and certification, and the assessment and recognition of the competences acquired within non-formal and informal learning contexts.

Despite the progress made in regulating the validation of prior learning, the insufficient use of the existing legal framework (except for initial VET) remains one of the limits of introducing life cycle approach in education and training. The insufficient development of the transfer mechanisms of the learning outcomes between various learning environments limits the possibilities of the population, especially for the adult population, to re-enter into the formal education even if the competences acquired in the labour market have been formally validated. Also, at the policy making level, more coherence between education and initial training policy and CVT policy is needed.

The generalization of the validation of learning outcomes, a better articulation between education and initial VET and CVT, an improved definition and transparency of qualifications are issues to be addressed through the development and

Romania, however, is advancing in the area of accreditation and validation of prior learning as it has set up a national agency and its network to promote such activities with an identical approach being developed opposite to many countries' status in that field in Central-East Europe.

As it was previously indicated, validation of prior learning has been regulated and implemented within the CVT (Continuing Vocational Training) system. The competences assessment centres are accredited by the National Adult Training Board.

Legislative and institutional framework for the validation of prior learning has been already implemented, however, Romania must participate different European projects aiming to improve the instruments for self-evaluation and external evaluation of the competences acquired in non-formal and informal learning contexts.

6.5. Improve the monitoring of the adult learning sector:

According to the CONFINTEA VI Report on Romania, the National Centre for Staff Training in Pre-university Education and their 16 operational Regional Centres, has the aim to enhance proper counselling, *monitoring* and efficient assessment of the continuing training activities. This structure will support the development of a diversified staff-training offer which, this way, facilitates the access of training providers, and involves lower costs and equitable opportunities for teachers and school managers to participate in continuous training programmes.

The Ministry of Labour, Family and Equal Opportunities (MLFEO) is responsible for *the monitoring* of the implementation of the Short- and Medium-Term Strategy of Continuing Vocational Training 2005-2010 (approved through G.D. no 875/2005). The MLFEO initiates, in cooperation with the MERY, the legislation regarding the CVT. The National Observatory for Employment and Training established through Order no. 564/2006 of the MLFEO functions within the Department for Labour Force Programmes and Strategies, having a central role in the monitoring and evaluation of the impact of training programmes and strategies. The Observatory will be an important source of information also with regard to the efficiency of measures designed to encourage adult participation in lifelong learning, and measures targeted at specific groups (including the elderly).

The National Agency for Employment (NAE) implements the policies and strategies regarding employment and vocational training of job-seekers, elaborated by MLFEO and

coordinates, guides and controls the activities of the subordinated county agencies, whose roles are regulated by law.

The CONFINTEA VI Report on Romania indicates, according to monitoring, that the multi-annual Phare Project 2004-2006 “Developing continuing training for staff in pre-university education” developed by NCTPE is addressed to teachers and managers from the high schools in rural areas. Specific objectives of the project were:

- to develop the relevant capacities within NCTPE and the 16 regional centres, by improving the standards of continuing training for the main final beneficiaries (managers and teachers), including the adaptation of the continuing teacher and managers curricula and the development of the capacity of the Specialized Commission for Accreditation to evaluate and accredit training programs;
- to identify and develop the teachers’ and managers' necessary competences in providing quality education in rural schools;
- to improve the quality and the methodological framework of the in-service training system and the training programs accreditation procedures.
- to provide support and assist the NCTPE for the preparation, implementation and monitoring of the grant schemes to be implemented in Phare 2005 and 2006.

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