

IMPROVING SCHOOL LEADERSHIP IN HUNGARY

OECD COUNTRY BACKGROUND REPORT

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January 2007

This report was prepared by the Performance Management Research Centre, Corvinus University of Budapest for the Ministry of Education, in the context of the OECD Activity Improving School Leadership, and following common guidelines the OECD provided to all countries participating in the activity. Country background reports can be found at www.oecd.org/edu/schoolleadership.

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EXECUTIVE SUMMARY

1. The social and economic environment of Hungarian public education

In the 1990's *large-scale social and economic changes* took place in Hungary. The single party regime and the planned economy were replaced by a multi-party democracy and a market economy. As a significant phase of this process, on 1st of May 2004 Hungary *became a full member of the EU*. These changes had a major impact on the educational sector. Decentralising processes replacing the old *centralised system* became increasingly perceptible *in public education*, and the Hungarian central and local authorities started to move towards a distribution of responsibilities.

Economic growth started and the GDP became growing at a higher pace in the second half of the 1990's, whilst the inflation rate decreased. In the present, the *state budget deficit* is the main problem, which considerably grew in the past few years both in absolute degree and compared to GDP. For decreasing the state budget lack, the government has constituted restrictive arrangements and significant structural reforms started in the field of more public services. This possibly goes together with the transformation of state roles and with the retardation of general public expenses.

Parallel to economic transformation, significant social changes also happened, *the gap between different groups of society widened*, and the number of underprivileged people increased. The population can be segmented by the geographical location of residence, because the various regions in Hungary show big differences in terms of economic development and living standards. In Hungarian school system is highly selective in nature, it reveals the social disparity. On thither hand the need for schooling increased in the society, the rate of upper educated people became favourable in international terms.

Hungary has now one of the worst demographic situations in Europe, which is due to the *medium birth rate and high level of mortality*. For the institutions of public education the population decrease means the *decrease of student number* (in the last two decades the number of live birth decreased almost by 50%). Regarding the labour market, the employment was the main problem in our country. In 2004, in Hungary the employment between the 15-64 year population was 56.8%, rather low in comparison with the ratio in other EU states. Also the ratio of unemployment increased in the past years.

2. The main characteristics of Hungarian school system

Pursuant to the Public Education Act as amended in 1996, the period of compulsory school attendance has been extended from the age of 16 to 18 for all who started school after 1 September 1998.

The current structure of the education system is the following:

- *primary school*: is the institution primary and lower secondary education, it works with 8 grades, which pupils typically attend from age of 6 to the age of 14.
- *grammar school*: prepares for the higher education, substantiates the general literacy in 4, 5, 6 or 8 years. The 12th grades end with secondary school-leaving examination. It is schooling students that finished primary school into the 9th grade, but in the 1990's it schooled also 10, 12 years old students into six-grade and eight-grade programmes.
- *vocational secondary school*: prepares for the secondary school-leaving examination, provides general education, and work with 4 grades from grade 9 to grade 12. The vocational schools provide theoretical and practical education (pre-vocational) in the 11th grade. The vocational secondary schools also prepare the students for the vocational graduations after secondary school-leaving examination.
- *vocational training schools*: prepare for the entrance to the labour market, working with 4 grades. The education starts in grade 9, and ends with vocational exam in the 12th grade.

In the 1990's the number of primary school student significantly decreased due to demographical processes. The transformation of institutes and the changes of the number of teachers employed slowly follow the pupil headcount decrease. Whilst financing was strongly connected to the number of pupils,

the decrease of the pupil's headcounts meant a serious competition among primary schools, and intensified the selective processes in the primary education.

In secondary education the effect of demographical decrees was compensated with expansion of secondary education and as its consequence, between 1990 and 2004 the number of the secondary school students grew with 9,2%. The education at this level expanded both vertically, and there were important changes of the horizontal structure. The interest in secondary schools offering a secondary school-leaving certificate grew, however, the number of students enrolled in vocational training schools reduced considerably. A high percentage of secondary level institutions created a mixed profile, in other words they offer several training programmes for their students.

The *financial sources* necessary for public education is provided primarily by the central budget in form of normative per student capita grants, and partly by the maintainer's own share. The basic normative funds are the same for both local government and non-state school maintainer (churches, foundations, public beneficiary or economic organisations). On a national average, the central budget support covers only 50-70 % of educational expenditures. The teachers' income status improved considerably at the beginning of the years 2000, under the public employees' pay rise implementation in September 2002. Internationally compared, the increase of basic salary has improved the situation of those working in public education, thus the income of the Hungarian teacher is still behind the OECD average.

The *administration of public education* is highly decentralised, and the responsibilities are shared between several actors. Horizontally, the responsibility at the national level is shared by the Ministry of Education and Culture, which assumes the direct responsibility for educational matters, and certain other Ministries – vertically, the responsibility is shared between the central (national), regional, local and institutional levels, i.e. there are four levels of control. At local and regional level, the administration of education is integrated into the general system of public administration that, at this level, are organized on the basis of local governments. The influence of the regional level is rather weak, but the scope of local and institutional responsibilities is very broad.

The responsibility for *employing and paying teaching staff* is also shared: nationally, the conditions for the employment and remuneration of public employees are developed centrally, in a uniform manner (e.g. the concrete conditions of the teachers' employment, compulsory number of lessons). The employees of the school are employed locally. The employers of the principals are the maintainers, their employment and remuneration is subject to the decision of the town council of the local authority. The principal is the employer of teachers. The wage scale for public employees determines the standard minimum wage to be paid to a teacher, by virtue of local decisions teachers may receive a higher salary. However, because of the lack of financial sources the minimum salary defined in the law usually means the top limit.

The *content regulation* is a significant field concerning control aspects. Apart from the central framework curricula, the institutions share responsibilities as well. The local curriculum must contain the subjects taught in various grades, the number of lessons for elective and compulsory activities, the requirements of the various subjects, principles of selecting course-books and resource materials, criteria for entering the following grade. The local educational programme of schools takes effect on approval by the maintainer of the school.

The *goals of the education policy* are represented most extensively by the medium-term public education development strategy of the Ministry of Education that was created in 2003. The Hungarian Lifelong Learning (LLL) Strategy refers to the next strategic planning period between 2007 and 2013 and it is in a very complex connection with several fields and sectors. In the recent and in the following years, the realization of the goals of education policy is enabled principally by the supportive system of the European Union.

3. School governance and leadership

In the study, those are considered school leaders who fulfil leader tasks and functions, so we primarily don't proceed from the occupied constitutional position. Although, the public education law announces individual responsibility: that means the principal is responsible for the efficient and legal functioning of the institution, on the other hand, it is the principal's duty to draw in the members of teacher staff, furthermore the legal environment provides school principals great latitude to divide leader duties.

The greatest challenges regarding school leadership can be summarized in the followings:

- *Efficiency challenge:* The main reason for efficiency issues is the material and human capacity surplus in schools as a result of a decreasing birth rate, additionally regulations don't stimulate its reduction. Maintainers have had and have difficulties to face the institutional-rationalizing compulsion. Because of the specific features of financing and the demographical state, the aim of the schools is to draw the most possible students to their institute.
- *Challenges to increase sensitivity towards performance:* The PISA survey made Hungarian education face a more unfavourable achievement rate than it was believed publicly. As an influence of the research, the education system started to focus on developing the main competences instead of cognition in teaching. The fact, that competence-based education has important consequences to organizational techniques and methods used in Hungarian schools, is not really apperceived yet within the teacher staff. The competence assessment since 2001 and the new type of secondary school-leaving examination introduced in 2005 provide feedback for schools about student-, and through students about the institutional performance. Temporarily, it's exclusively the school's choice why and how to make use of the information.
- *Challenges of teachers supply, motivation of teachers:* In Hungary, the social prestige of teacher career is low. Additionally, the career of an educator was more and more limited in the past ten years and young teachers have a hard time to get a position at a school. Financial motivation has limited possibilities, the extra work of management on the middle-level (vice-principals, work community leaders and head teachers) can't be paid for. The leaders have to face lack of motivation.
- *Technological and pedagogical challenges:* At the moment, a challenge for innovation occurs in two specific fields; in the field of foreign language learning and info-communication technology (ICT). It is an important task of schools to introduce these fields to their daily educational routine.
- *The effects of the accession to the EU:* The effects of accession to the EU occur mainly in development-political priorities. It is still not known, and it depends on the school leadership in many aspects, whether the available resources will be used purposefully and efficiently.
- *Fast change of the legal environment:* Since the change in the political system, persons involved in public education have been suffering continuous and quick changes. In many cases, the surviving the changes and formal adaptation are the given answers and not real changes.

In the decentralised education administration system, the independence of schools is large; the latitude of *maintainers* (in case of most schools it is the local government) is average: its influence is developed mainly through financing, when complements state normative grants with sources indispensable for schools. The extent of the contributions from the revenues of school maintainers very much depends on the size of the settlement. The professional leading role of the local governments is developed in the way that approves documents necessary for the institute's function. Although, the maintainer could evaluate the performance of the school through the quality management systems prescribed by the law, practice indicates that it is very rare. In Hungary, there are no compulsory inspectorates, maintainers are able to attend these assignments with the aid of accredited experts.

Because of the institutional autonomy, the *teaching staff* has the right for decision in important scope of duties (the acceptance of the school educational programme, the organizational and operational statutes, the school rules and the quality management programme). The teaching staff with a large area of jurisdiction and the existence of a leader with a wide range of tasks but a smaller area of jurisdiction seem characteristic, which motivates leaders to constant matching while creating strategic documents, making decisions regarding operating.

Regarding distributed leadership, *deputy school heads* have an important role, who, regardless the size, type of schools, number of students and inner regulations, can have different number and different scope of duties. Institute leaders can decide in what ways and manner they delegate assignments for deputy school heads. For the inner management of the institute, principals rely more and more on their deputies, in numerous schools the fulfilment of strategic assignments is delegated to vice-principals. Examining the structure it can be stated that flat structure is the characteristic of schools. The attendance of assignments belonging to *middle-level management* represents a problem in many schools. One of the main reasons is that teaching staffs are not motivated to attend these tasks; the incentives are missing.

From the middle of the 90s, similarly to other fields, different forms of *regional cooperation* emerged in public education. The formation of micro-regional partnerships that were based on economical and professional rationalization accelerated from 2004. Micro-regional partnerships receive distinct supports determined by the budgetary act, what resulted in the spreading of common school maintenance in almost all Hungarian micro regions. The other type of network cooperation, the *innovative networks* plays an important role in the life of the educational institutes and educational system. These network-type cooperations are the scenes of professional and organizational learning in the way that can function as new forms of education governance and efficient frames of innovation.

4. Enhancing learning and school leadership

School performance can be evaluated in two dimensions: first is aimed at the financial balance, sustainability of employment and – in more and more frequent situations – the bare survival of the school. The second is the professional performance of the school's educational program. The fact, which of the two dimensions is emphasized more at a school, depends on the possible consequences. Practically, there are no consequences in case of professional performance: most of the schools maintained by local governments do not evaluate teachers' work from the point of view of professionalism. The administrative-financial dimension has a greater attention, the difficulties of school maintenance force local governments to rationalize capacities.

However, in the decentralized public educational system the school management is primarily responsible for the efficiency of learning, the deficit of the accountability in connection with professional evaluation stimulates school leaders to determine schools success through survival and financial security. In order to do this, successful school principals use a major part of their working time to obtain the necessary resources: they apply, discuss, travel, network – a major part of their time is spent outside the school's walls. The accepted leading role becomes an outside-oriented management role, thus having less time to actually lead, to stay in contact with school staff, to develop the organization and organizational members – in one word, for the leader role.

School evaluation starts to be a daily issue in public policy. The system can be generally considered very wide-spread, on and all it is equivalent with a coherent decentralized system, based on institutional/maintainer independence, and a centrally supported and supervised evaluation system in Hungary. Amongst the potential devices of the evaluation system, there are national tools (accreditation, the uniform secondary school-leaving examination introduced in 2005, the national competence assessment initiated in 2001, the orders of secondary schools), local tools (quality management programme of the local government, the publicity of school documents, expert system) and institutional tools (institutional quality management programme). The main deficiency of the school evaluating system is the fact that the usage of the results for development is not general. The reason of this could be the low publicity of measures and evaluations, additionally, the lack of methodological knowledge and inner motivations.

School leadership has several ways to influence the school: the determination of appropriate aims, the people's development and the redesign of the organization can function as leadership tools that may improve (even) the quality of education. Hungarian schools have great independence in forming their inner organizational frame. Although *school curricula* and the regulations concerning *educational programmes* have changed in the last 10 years, the content determination of education is in the hands of certain schools, since National Core Curriculum was introduced in 1995. The national legislation sets only the frame (the tightness of the frames was different in the analyzed period), the content becomes the responsibility of schools and leaders.

The leader's influence upon the institute's processes of *human resource management*, in theory, is important because the principal is the employer of all teachers and other school employees. However, school heads have only few inspirational opportunities, the leader usually cannot differentiate in wages according to performance, and the other possibilities of motivational elements is not too wide. Additionally, the evaluation of teachers' individual performance is comparatively rare in Hungarian schools. An important tool of teacher development is the in-service training system, which is compulsory for everybody to attend: they have 120 lessons to complete in every 7 years. In the future, an important aim is that teachers' development and their in-service training should not only "happen" just because it is compulsory, but because schools – including teachers – recognise its significance in order to increase performance. In Hungary, educational policy supported the *improvement of organizational processes* within the frames of quality management programmes; practically this was the only, centrally supported initiative within this field.

5. The attractiveness of school leader role

Observing the *main characteristics of school leaders* we can state, that though the average age of teachers also increased within the last 1.5 decades, school heads are much older than the teachers led by them. The cause of this significant difference might be that the basis of the director's authority is based upon the years spent as teacher and not on leader qualities. In the past few years, principal career became more limited, the rate of newly appointed principals considerably decreased. This can be explained by the closing of the position (the directors already in position obstruct the aspiring young ones), and by the decrease of the attractiveness of the position as well.

The basic principles of *the application for a leader position and the selection procedure* are nationally the same. The vacancy of school leader positions is filled in decentralised way, by an open competition. The prolongment of the position also has to be preceded by an open competition. It is no real competition in spite of inviting applications, due to the low number of applicants. On average, 1.2-1.3 applicants are for one position which, most of the times, including the present principal as well. The basis of choice is small and in general, the attractiveness of school leader position is very low.

The *principal assignment* is for a determined period: min. 5, max. 10 years. The form and period of employment does not change in different types of school, the requirements do. In general, the law defines three conditions of the assignment: 1. Proper qualification (higher education degree and specialization), 2. At least 5 years experience as a teacher, 3. Being employed for an undetermined period of time in the given institute. Actually, newly appointed principals spend more than 5 years in pedagogical position, on average, they become principals after 20 years of professional experience. It is unlikely that leaders would come from another sector to be the head of a school.

At present, there is no uniform *leader evaluation practice*. Depending on the situation of the maintainers, unique solutions are born, mainly in case of those who have several schools and educational department. In case of most institutes, no real performance expectations are formulised what makes the identification of professionally unsuitable leaders more difficult.

The *compensational and salary system* of school heads correspond to the teachers' and public employees' system. The salary is compounded from two elements: basic payment and allowance. The amount of the basic payment depends on the qualification and the time spent as public employee. This type of basic payment is defined by the law as the guaranteed minimum salary, so the employer can give more than this minimum (if possible, if wished). The other element of the salary is the system of

allowances that can be granted for additional duties (e.g. institute leading). A part of the allowance has to be given obligatory, the other part is optional, it depends on the maintainer.

Leadership can be an outbreak for those, who are not able for renewal in their pedagogical work, while for a school leader, the characteristics of the tasks and the skills change. The creativity noticeable in management practice might serve as a challenge for the leaders, which can regenerate the attractiveness of the leader post.

6. The development and training of school leaders

In Hungary, school leaders' preparation and professional development are realized within the *in-service teacher training system*. For leader training, higher education institutes offer 2 years master programmes providing diploma; their content is detailed in the legislation. Professional developing short-term programs and courses offering a more profound familiarization with management and leadership issues can be found within the frame of in-service teacher training system, but the supply of these types of courses is relatively low.

Neither the previous leadership experience (e.g. as head of professional team of teachers teaching the same subject), nor a leader qualification are the conditions of the school head appointment. The importance of public education leader training and the significance of the acquisition of this type of training are better recognized nowadays by the education policy; the referring legislation took shape gradually from the mid 90s. Owing to the 2002 legislation modification, in case of leader appointment those candidates are privileged, who acquire in higher education a post-graduate professional examination by completing an accredited, specialised training. However, it is not defined yet in what kind of field should they acquire the certificate. The acquisition of leader specialisation is the precondition of the reformation of the institute leader's position (and not of the occupation of the position) only from 2015. For newly nominated principals, there are no support or induction programmes. Nevertheless, there are local governments, which encourage candidates to finish some kind of leader development program.

The requirements of *public education leader qualification* are regulated by ministerial decree, which puts down its aims, conditions of performance, content, and gives directions to the development of methodology and to the performance assessment. The competence is great on the field of leader training programmes, many universities and colleges have these types of programmes. On the other hand, this market is comparatively concentrated, it is dominated by two significant institutes: the public education leader-training programme of the Budapest University of Technology and Economics (BME) and the Hungarian-Netherlands School of Educational Management (HUNSEM).

In Hungary, the legislation and the controlling accreditation are supposed to assure the quality of trainings. Another way of quality control is to develop training programmes to identify leadership *competencies* or to develop standards for leadership performance, furthermore to prepare training programmes aiming at their improvement and fulfilment. In Hungary, neither the standards and expectations regarding the leaders' professional performance, nor the definition, measurement and feedback of leadership competencies to be improved haven't been fulfilled yet.

The procurement of the teachers' post-graduate professional examination and the participation in in-service teacher trainings are not free of charge, but the state, based on the number of teachers, contributes to the expenses on a normative basis. However, the continuous decrease of the amount of the in-service training normative is problematic. If the specialization exam was successfully taken, the teacher has to be included in a higher wage category (teacher with special certificate), accomplishing the in-service teacher training programmes to be completed in every 7 years, the 3 year-long waiting time between wage categories will be decreased by one year. The inclusion in the 5-10% higher salary class stimulates participation. Inclusion in a higher salary category often represents a stronger motivation than acquiring knowledge.

INTRODUCTION

This country background report about the improvement of the Hungarian educational management was prepared within the framework of the OECD programme „Improving School Leadership” which took place between 2006 and 2008. The 22 participant countries will all prepare a country background report on the grounds of the guidelines given by the OECD.

The main goal of this programme is the developments of education policy, which can systematically control the teaching and learning process. A further goal is the synthesis of a survey result concerning the management development, the presentation of the innovative and the effective education policy, the experience exchange between the countries and the identification of education policy options. In accordance with the scope of the Country Background Report, it is intended to three main target public: on the one hand to the OECD Education and Training Policy Division and to the participant countries, on the other hand to all who are concerned in the matter of management development in the Hungarian public education sector, and finally to who are interested in this field in international context.

This country background report was prepared by Corvinus University of Budapest - Faculty of Business Administration - Budapest Research Centre of Performance Management, by the proxy of the National Institute for Public Education and of the Ministry of Education and Culture. The OECD has encouraged the participant countries to involve in this study as many stakeholder concerned as possible. According to this, the Advisory Board supported the work of the authors and of the national coordinator (Éva Révész), of which members are the followings: Zoltán Ötvös (Ministry of Education and Culture), Éva Balázs (National Institute for Public Education), Gyula Bakacsi and László Lázár (Corvinus University of Budapest – Institution for Management Sciences), Tibor Baráth (Hungarian-Netherlands School of Educational Management), Péter Radó (Centre for Education Policy Analyses), Tas Szebedy (National Grammar Schools Association), and János Setényi (Expanzió Human Consulting Ltd).

The country background report was written by a team formed by members of the Budapest Research Centre of Performance Management and the National Institute for Public Education, based on the work of the following persons: Chapters 1-2 by Anna Imre, Chapter 3 by Éva Balázs, Norbert Kiss and Zoltán Bácsi, Chapter 4 by Dániel Horn and Norbert Kiss, Chapter 5 by Gergely Kováts and Dávid Bauer, Chapter 6 by Éva Révész. The authors are grateful for the data and remarks provided by Gábor Halász, general director of the National Institute for Public Education, for the help of the members of the Advisory Board, and the persons interviewed (Appendix 3).

CHAPTER 1 – THE NATIONAL CONTEXT OF SCHOOLING

1.1. The Hungarian social, economic and cultural background

1. The large-scale social and economic changes of the 1990's were partly preceded and partly accompanied by those *political processes*, which led to the evolution of parliamentary democracy in Hungary. As a prominently significant phase of this process, a new era has started on 1st of May 2004 while Hungary became a full member of the EU. In the recent period of just over a decade, a series of political decisions had to be taken to achieve this goal. The single party regime and the planned economy were replaced by a multi-party democracy and a market economy, which both had a significant influence on the educational sector. The 1990's law for local government brought a significant change in public administration, due to the responsibility of public administrations became wide, including public duties. The central and local authorities now share the responsibility for public education, and the structure of decision-making has shifted from a centralised pattern to a decentralised one.

2. Like in the other Central and Eastern European states, fundamental changes took place in the social and economic field in Hungary after the political changes in 1990. These transformations had a major impact on the system of education. In the *economic* sector, the transition to market economy required radical decisions to be made, and as a result, a number of jobs were terminated, and the employment structure was changed in a great deal. The economic crisis had an adverse effect on public services. Public expenditure was reduced largely, labour market demand changed significantly. By the second half of the 1990's these processes had largely ended and, partly as a result of political decisions radically aiming at the balance of state budget, an economic recovery started in 1997. Between 1997 and 2001 the annual growth of the GDP was 4,5%, and between 2001 and 2005 it grew with an annual average of 4%. (KSH, 2006). Presently, the huge deficit of the state budget is a great problem, for the treatment of which the government has constituted restrictive arrangements. Healthcare, public administration and education are in for significant structural reforms, which possibly go together with the transformation of state roles and with the retardation of general expenses. All this considerably influences the financing of public education and probably results in a more purposeful and more effective economy in this sector.

3. In the past decade, the internal conditions of schools were greatly influenced by certain *social changes* that took place in parallel with the transition of the economy. In the 1990's, the gap between different groups of society widened, and the number of underprivileged people increased. This includes the Roma population of several hundred-thousand people, whose integration in the society and on the labour market means a difficulty up to this day. At the same time, a small group has emerged on the top layer of society, which represents a counterpoint in this respect, as they have the capacity to exploit the political and, more importantly, the economic opportunities arising with the transition to democracy. Surveys about the wage disparity in Hungary show that in the first years of the market economy the disparity grew rapidly, the period until 1996 is characterised by an economic growth and unchanged disparity index. The most recent survey shows that in 2005, the wage disparities in comparison with the year 2003 are rather lower, they match with the disparities from the second half of the 1990s. In the EU indicator system the poverty rate was 12% in 2005, which is a decrease in comparison with the two years earlier data, and it is similar to the poverty results of the end of the 1990's. (Medgyesi 2006). The population can be segmented by the geographical location of residence, because the various regions in Hungary show big differences in terms of economic development and living standards. In comparison with other countries, the Hungarian school system is highly selective in nature, it reveals the social disparity (see recent OECD-PISA surveys).

4. With the appearance of the unemployment after the regime change and with the pay rise of the higher educated people, the population's demand for education has grown. The educational expansion of the 1990's has contributed to the increase of educational demands of the younger population;

therefore the rate of upper educated people became favourable in international terms (Education at a Glance, 2005).

5. With the evolution of parliamentary democracy, *national and ethnic minorities* living in Hungary are claiming identity with increasing determination, after the Act on the Rights of National and Ethnic Minorities¹ took effect, they became more active in asserting their interest in preserving their mother tongue and cultural values. The act recognises the 13 minorities living in the country as a state constituting factor. These minorities, in order of population size, are Roma, German, Slovak, Croatian, Romanian, Ukrainian, Serbian, Slovenian, Polish, Greek, Bulgarian, Ruthenian and Armenian. The other minorities living in Hungary are smaller in size (see Table 1.1 in the Appendix 1.). According to the 2001 census, the number of those claiming Roma minority origin has greatly increased compared to the data of 1990, and their number is now nearly 200,000, but according to the estimations, their number exceeds 500,000. Compared to the relatively small minority groups, Hungary's *migrant population* is even smaller. Although the opening of the borders as a result of the political change has led to an increase in the number of immigrant foreign nationals, their overall number is not significant, and their impact on schools do not cause insurmountable difficulties at the moment. A much bigger problem is the integration of the Roma community and the provision of education to the growing number of school age Roma children whose cultural roots are different from those of the mainstream society. The Hungarian teaching community was not prepared for the increase of the number of *pupils of Roma origin* and for catering for the needs of their partly special needs. The aim of Hungarian education policy is to organise education in the spirit of integrated teaching and learning with a view to education for tolerance and the acceptance of the Roma by mainstream society.

1.2. General demographic trends

6. As part of the external social processes having an impact on public education, demographic conditions deserve special attention. With the sizeable age group of the first half of the 1970's leaving the school system, the demographic decline began, and schools experienced their tangible effects. The school age population continues to shrink, although demographers forecast the growth of the birth rate in the middle of the 1990s claiming that the above mentioned age group would become old enough to have children. This has not happened though, which may be because nowadays women prefer to have children at an older age. In accordance with the current trend, the birth rate continues to decrease, from 130,000 births in 1985 to only 95,000 in 2004. As a result, the percentage of the school age population continues to decrease (see Table 1.2/A and B on the number of pupils in the various school age groups in the Appendix). Between 1990 and 2001, mortality exceeded the birth rate by 373,000. The decline was particularly notable among children and young people. The population under 40 years of age decreased by 530,000, whilst the number of people over 40 increased by 340,000. Consequently, the population decline is accompanied by the aging of the population (see Table 1.3 on the distribution of the population by age groups and gender in the Appendix 1). Overall, Hungary has now one of the worst demographic situations in Europe, which is due to the *medium birth rate* and *high level of mortality*. For the institutions of public education the population decrease means the decrease of student number, from the beginning of the 1990' this phenomenon is perceptible in the primary schools, varying from region to region (the decrease of the student headcount was especially strong in the capital city, but in the northern regions, where the birth rate is higher was less noticeable). At the beginning of the 1990s, the decrease of student headcounts reached also the secondary education, but here the decrease was compensated with the growing schooling demand of the population and with the structural changes of the school system.

¹ Act LXXVII of 1993.

1.3. Economic and labour market trends

7. After the second half of the 1990's, Hungary managed to overcome the crisis caused by the transition to market economy. The GDP started growing at a higher pace after 1996, whilst the inflation rate decreased (see Table 1.1 A and B in the Appendix 1). The financial crisis evolving throughout the world had slowed down economic development, and growth came to a standstill in 2001. Between 1995 and 1998, the gross domestic product (*GDP*) was still growing rapidly. In 2001, however, economic growth slowed down considerably, although it was still over the average (4,1% in 2005) in comparison with international figures. In present, the national budget deficit is the main problem, which considerably grew in the past few years both in absolute degree and compared to GDP. (see Table 1.1/C in the Appendix 1). For decreasing the state budget lack, the government cut down the state expenditures, and defined in long term the public expenditures.

8. Economic processes have a powerful impact on publicly financed areas (e.g. health care, education) through the state budget. One of the most influential factors of financial resources allocated to education is the performance and growth rate of the economy. Therefore, one of the most frequently used indicators of analyses is educational expenditure as a percentage of the GDP. In the early years of the 1990's educational expenditure and, within that, expenditure on public education followed the growth rate of the GDP, which was followed by a slow decrease and a major slump after the middle of the decade. Between 1994 and 1998, the value of this indicator fell from 6.4% to 4.8% in the whole education sector while from 5% to 3.6% in the public education (pre-school, primary and secondary levels). In 1999, the decreasing trend stopped for the whole system of education (see Table 1.4 in Appendix 1.). Between 2000 and 2004 the educational expenditures of state financed institutions and those of the non state institutions (local government) have grown from 3.64% to 4.27%. (Hermann, 2006)

9. Regarding the labour market, the employment was the main problem in our country. In 2004, in Hungary the employment between the 15-64 year population was 56.8%, rather low in comparison with the ratio in other EU states (63,3% in the member states). The changes of the employment and the unemployment were followed with attention among the 15 and 74 years old population. The ratio of unemployment has grown with 70,000 persons, and with this the ratio of unemployment has grown from 5.6% to 7.3%. (Medgyesi, 2006)

10. With the accession to the EU, Hungary was entitled to recourse to union development support. On behalf of the HEFOP (Human Resource Development Operational Programme) educational targets, by the end of the year 2005 contracts were concluded with the candidates in worth of 35851 million Ft, from these 75 % union funds and 25 % inland funds. The assurance of the resources and the fulfilment of the candidacies happen in the same time. Until the end of the year 2005, money coming from resources was 16003 million for the successful candidates. For the educational targets of the RFOP (Regional Development Operational Programme) the disposable sum of money was 13785 Ft. (see Table 1.5-1.6 in the Appendix 1.) (Hermann, 2006)

CHAPTER 2 – OVERALL DESCRIPTION OF THE HUNGARIAN SCHOOL SYSTEM

2.1. Structural characteristics of the educational system

11. The Public Education Act determines the structural characteristics of the educational system. (Act LXXIX of 1993 on Public Education and its amendments from the years 1996, 1999 and 2003.). In accordance with the current regulation, *compulsory education* lasts until the end of the year in which the pupil in question becomes 16 years old. In 1996, Parliament has adopted a decision on extending compulsory schooling from the age of 16 to the age of 18, pursuant to that decision those pupils who started their education in the first grade of primary school after 1 September 1998, must go to school until the age of 18.

2.1.1. Types of schools

12. The following types of schools can be distinguished in Hungary (see Appendix 2.):

- *primary school*: is the institution primary and lower secondary education, it works with 8 grades, which pupils typically attend from age of 6 to the age of 14.
- *grammar school*: prepares for the higher education, substantiates the general literacy in 4, 5, 6 or 8 years. The 12th grades end with secondary school-leaving examination. It is schooling students that graduated elementary schools into the 9th grade, but in the 1990's it schooled also 10, 12 years old students into six-grade and eight-grade programmes.
- *vocational secondary schools*: prepare for the secondary school-leaving examination with pre-vocational elements, provide general education, and work with 4 grades. The pupils are schooled into the 9th grade, and the education finishes with the 12th grade with a secondary school-leaving examination. The vocational schools provide theoretical and practical education (pre-vocational) in the 11th grade. The vocational secondary schools prepare the students for the vocational graduations after secondary school-leaving examination. The number of classes is determined by the OKJ (National Training Register).
- *vocational training schools*: prepare for the entrance to the labour market, working with 4 grades. The education starts in grade 9, and ends with vocational exam in the 12th grade. The 9th-10th grades provide general education, further on it is carrier oriented vocational education. In 11th-12th grades students are prepared for the vocational examination.

13. According to their maintainer, the following can be distinguished: (see also Table 2.4 in Appendix 1.)

- **State financed schools:**
 - school maintained by the local government
 - schools maintained by the county government
 - schools maintained by the central budgetary institutions
- **Private schools**
 - schools maintained by churches
 - schools maintained by foundations, associations and other maintainers

2.1.2. *The groups of school employees*

14. Employees of the state and local government in Hungary are civil servants or public employees according to the legislative provision. The *civil servant* status – on the grounds of the Act XXIII from 1992 on the legal status of civil servants – contains administration activities, and is serving in the central and local public administration (e.g. ministries, local governments, courthouses). The *public employees* are such employees, who will be employed at organisations of the state and local government (e.g. schools, hospitals), as well as by the public utilities of the local government (Act XXXIII from 1992 on the legal status of the public employees). The most populous group of the public employees is the teachers, the doctors and the medical employees follow them.

15. In Hungary, employees working in public educational institutions maintained by state or local government are *public employees*. For them the special regulation of the statutory order 138/199 (X. 8.) is to be applied. In public education the following occupation groups can be distinguished² (see Table 2.1 in Appendix 1):

- *The leaders* – here belong the school heads and part-unit leaders
- *Qualified teachers* – here belong the higher institutes teacher, secondary school teachers, vocational teachers of the secondary schools, other secondary institutes teachers, primary school teaches, kindergarten teachers, other elementary school teachers, therapists, conductors, health preceptors, other special teachers, preceptors, pedagogical experts, other qualified teachers and preceptors.
- *Other pedagogical occupations* – here belong the unqualified educators, persons in charge for children and young people, assistants, health-educator-assistant, therapists assistants and other educators.
- *Occupations, which require higher education* – here belong all the other non-pedagogical occupations, which require higher education: computer organiser, doctor, librarian, as well as other occupations that require higher studies.
- *Administrative employees* – here belong the back office work and business administration.
- *Service occupations* – here belong near the support service occupation (e.g. cook, property guard) also the industrial and agricultural occupations, as well as machinists and drivers.
- *Guardians, cleaner* – here belong technical workers, cleaners, guardians, and other unskilled labour.

2.2. The structural changes of the educational system

16. The size of *general basic education* has been dropping since the end of the eighties, but what the number of pupils, institutions and teachers concerns it occurred in different proportions. The number of primary schools was fairly stable in the 1980's and it increased in the 1990s in connection with that the ownership had been decentralised to the local governments, then came to a standstill in 1995, and the number of primary schools started to decrease after that year. In spite of that, the number of functioning schools was still 5.2% higher in September 1998 than in 1985. The number of pupils in primary schools started to decline already in 1987 because of the unfavourable demographical changes, in the 2004/2005 school year it is only 76% from the total number in 1990/1991. (see Table 2.2 in Appendix 1). The decrease of the headcounts has an effect on the number of institutes, on their average extant, and on the number of teacher working there. However, this decrease slowly follows

² Occupation groups are based on UCSO (Uniform Classification System of Occupations). Are not entirely similar to categories of Ministry of Education and of the public education law, so the calculations based on different databases may differ

the pupil headcount decrease. The smallest change is to be noticed in the number of institutes and institute units³ that mean 99% in 2004/2005 school year from the total of 15 years ago.

17. The *secondary education* did not decrease in what the institutions and the headcounts concerns, whilst the effect of demographical decrees was compensated with the vertical changes of structure. Number of students entering the secondary degree increased in the first half of the 1990s, but by the end of the 1990s decreased temporary, or rather stagnant, and by the turn of the millennium seems to increase again. Between 1990 and 2004 the number of the secondary school students grow with 9,2% (see Table 2.5 in Appendix 1.). In the headcounts of the secondary school teachers, a considerable increase is noticeable (see Table 2.6 and 2.7 in Appendix 1).

18. The number of student learning in the secondary schools influences the changes of vertical education. Because of vertical changes, the length of the phases of education has changed. General basic education has been reduced from 8 to 4 or 6 years in some places, whilst it has been extended to 10 years in others; secondary school education has been extended from 4 years to 5, 6 or 8 years, and has been reduced elsewhere. The importance of six and eight-year grammar schools increased in the 1990's. With the elongation of the general education period until the age of 16 years, the starting age of vocational training became 16 as well, namely 18 years in the secondary vocational schools, after the secondary school-leaving examination, enlarging this way the period of the education. A new development was the possibility of organising language preparatory grades for the secondary schools, which also enlarges the secondary education period with one year. In the school year 2004/2005 almost half of the secondary schools started language preparatory grades, which could be attended by student in the grade 9. (Entrance examination for the secondary school, 2004).

19. Although the size of the secondary education did not change considerably, in case of some programme types – through changes of the horizontal structure – considerable increase and decrease was noticeable. One of the main reasons behind *the changes of the horizontal structure of the public education system* is the *expansion of secondary school education*. Although expansion was one of the key objectives of education policy, the changes that took place were not governed by a deliberate educational strategy. Because of the structural changes and the general crisis and restructuring of the vocational education sector, the number of students enrolled in vocational schools reduced considerably. At the same time, the interest in secondary schools offering a secondary school-leaving certificate grew and the number of those entering education leading to such a certificate increased, in other words, an expansion of secondary schools began. As a result of restructuring, over 73% of all primary school graduates wishing to study further applied in secondary schools by the end of the 1990's, the rate of *secondary vocational school students* stopped by 23%. (see Table 2.8 in Appendix 1) An important feature of horizontal structural transformation is that in many cases it was made possible through the internal restructuring of existing institutions and not through the establishment of new institutions or the termination of old consequently, the number of institutions with a mixed profile has increased largely. Because of the horizontal structural changes, a high percentage of secondary level institutions offer several training programmes for students in grades 9 to 12. The changes and the growing number of institutions with a mixed profile make the boundary between general and vocational education blurred.

20. Changes in the educational system seriously challenged the schools and the school leaders in case of both primary and secondary schools. Among primary schools, the decrease of the pupil's headcounts meant a serious competition, whilst financing was strongly connected to the number of pupils. The contest for students intensified the selective processes in the primary education, which resulted in significant differences among the certain schools located in the same area. For the secondary schools the changes in structure meant also a legislative change, partly was the instrument

³ Place of assignment fulfilment is a public education statistical category, means within the given institute, institute units from different settlements, and in the head office or on the same settlement but with different public education assignment institute. In an institute there can be multiple places of assignments, e.g. primary school, grammar-school, college.

of keeping or increasing the student's headcounts (e.g. in case of grammar schools with 6 or 8 grades, and in case of secondary school the need to establish extra education profile). The prolongation of the general education from age of 14 years to 16, and with this the transformation of the grades 9-10 meant a serious employment problem for the vocational schools during the period of switch. With the increase of the student number and the change of student's composition, the secondary schools faced a great challenge; the same challenge was the introduction in the past few years of the new, uniform national school-leaving examination. In vocational training schools, near the decrease of the headcounts another problem for the institute leader meant the contra selected student composition and the deteriorating conditions. In the future, the elongation of the compulsory education till the age of 18 years will be the biggest problem to solve in the most secondary schools.

2.3. State and private funding in public education

21. The principle of central budget distribution did not change between 2001 and 2004. The financial coverage necessary for the maintenance of public education is provided mainly by the state budget in form of normative aids, and partly by the maintainer's own share. (Balogh –Halász 2003) The school maintainer receives normative support from the central budget. Educational institutions can manage their own business independently within the framework of the annual budget approved by the maintainer. The budget is the result of *bargaining* between the institution and the local authority. The normative support given to local government school maintainer, the basic normative support and the auxiliary support are non-binding, and can be used by the local government freely for different educational purposes, similar to the other normative support given to the local government. The normative support given for educational purposes is only one – but a very important - funding source of the funding system. Since 1997, the school maintainer receive so called binding normative supports and support in form of centralised budget estimates, these funds must be used by all mean for educational purposes. The basic normative funds are the same for both local government and non-state school maintainer (churches, foundations, public beneficiary or economic organisations).

22. Between 2001 and 2004 the ratio of the total central budgetary school funding were relatively stable, 70%, within the public education expenditures of the local government (Hermann, 2006). The ratio of the normative funding within the public education expenditures of the local government was 65-67%, except the year 2002. In 2002, the ratio was lower due to the fact, that the public government received funds for the pay rise. 95% of the funds given to local government by the state budget were normative funds for educational purposes. (Within this the ratio of the basic normative was 85%, the ratio of the complementary funds was around 15%) (see Table 2.10 in Appendix 1.).

23. The educational institutes can obtain their own incomes, from different sources. Typical sources are funds for competitions, letting buildings and instruments, and incomes from the paying in the school foundations. Own income is the latter, in 2001 18% of the school leaders mentioned this, but about the order of magnitude there is no information. (Balogh-Halász, 2003).

24. The situation related to the *income* of teachers has improved considerably at the beginning of the years 2000, under the public servant pay rise implementation in September 2002. In the 1990's the teacher's drop behind was the greatest compared with others working in the social economy sectors. Average gross salaries in the sector of education increased by nearly thirty percent, which, along with falling inflation, resulted in a significant increase in real wages (approximately 22,5 percent). As an effect of the pay rise, the income of the skilled teachers working in primary schools raised to 80% of the average incomes of the higher educated teachers (in 1992 this ratio was around 60%), the income of teachers working in secondary school exceeds the average income of the teacher with higher education. The improvement however was not the same for each pedagogical group. The uniform pay rise had only a moderated effect on teachers entering public education, but it moderated the carrier abundance of women with college degree, and a longer carrier routine (Varga 2005). Internationally compared, the basic pay rise has improved the situation of those working in public education, thus the income of the Hungarian teacher is still behind the OECD average (Education at a Glance, 2005).

25. The principle of funding non-state institutions includes duty-based normative financing and sectoral neutrality, so based on this principle, private schools may not receive less budgetary support than the support provided for the respective local authority under the same legal title. The government in two ways supports the performance of public duties by denominational institutions: through providing a share of normative contribution in proportion to the number of students, which is similar to the support of local authorities; and through supplementary funds, whose proportion is decreasing due to the strengthening guarantee of state financing. Private schools are also entitled to normative support. The level of support provided for non-state institutions is 10 % from the budgetary support, so the expenditure for non-state education are quite considerable as well. (Hermann, 2006). Non-state educational institutions may also take part in the implementation of local governmental duties identified in the Act on Public Education (under a written agreement between the maintainer and the local authority responsible for the duty, which is hereinafter referred to as “Public Education Agreement”), and they may receive additional support from the local authority for that. Under a Public Education Agreement, education can be offered for children and students free of charge in non-state institutions as well. Insofar as such an agreement does not exist, the private schools can demand charges – this vary from school to school, and there is no exact data about it.

2.4. Administration of the public education system: the general characteristic of shared responsibility

26. The main features of the administration of the Hungarian system of public education can be summarised as follows:

- The administration of public education is highly decentralised, and the responsibilities are shared between several actors.
- Horizontally, the responsibility at the national level is shared by the Ministry of Education, which assumes the direct responsibility for educational matters, and certain other Ministries – vertically, the responsibility is shared between the central (national), regional, local⁴ and institutional levels, i.e. there are four levels of control.
- At local and regional level, the administration of education is integrated into the general system of public administration, i.e. in other words there is no organisationally separate educational administration.
- At local and regional level of public administration (including educational administration) is based on the system of local governments, thus is under the control of politically autonomous, elected bodies. The local governments do not receive direct orders from the central government.
- The role of the regional level is rather weak, while the scope of responsibilities at the local and institutional level is fairly wide.
- The number of local authorities (local governments) is very high, while their average size is small (Balázs-Halász, 2000).

27. The institutions are directly concerned about the employment of school workers and about the regulation of content. The general characteristics of shared responsibility influence the nature of control over each area. Like in most areas of educational administration in Hungary, the responsibility for employing and paying teachers is also shared. In this case, however, the responsibility is shared not only by the various levels of control, but also within the level of central government. In employment and especially remuneration, the central level has crucial responsibility: the conditions for the employment and remuneration of public employees are developed centrally, in a uniform manner. Public education institutions must apply the legislation on public employees together with the Public Education Act of 1992 (as amended in 1993, 1996, 1999 and 2003). This latter lays down the precise

⁴ In this text, the expression *local* generally refers to the *municipal* level, unless another meaning is indicated. Vertically, the municipal level is directly above the institutional level.

conditions for the employment of teachers by various school types, the scope of their benefits and allowances, as well as the compulsory lessons in the various school types and teaching positions. The employees of the school are employed locally. The employer of the principal is the maintainer (which is the local authority in most cases, and there are approximately 2400 local authorities that maintain institutions), their employment and remuneration is subject to the decision of the town council of the local authority. The principal is the employer of teachers. He has decision-making authority within the limits of the above-mentioned regulations and the local and school budgets. As regards remuneration, although the wage scale for public employees determines the standard minimum wage to be paid to a teacher with a certain time of service and qualification, by virtue of local decisions teachers may receive a higher salary. The wage of the individual teachers is determined locally, but within a central regulatory framework. An essential characteristic of the Hungarian system of public employee remuneration is the lack of direct links between the central control of wages, the sector specific central budgetary support and the local decisions on employment and remuneration. Local authorities, who perform a series of different local duties, receive central funds including the central contribution to teacher salaries without any obligation as to the use of such funds. In addition, the majority of schools manage their own business independently, and has a great deal of autonomy in making decisions on wages (Balázs-Halász, 2000).

28. The other document, which concerns the institution directly, is the regulation of content. In the Hungarian practice, there are two kinds of regulations; apart from the central framework curriculum (National Core Curriculum - NAT), the institutions share responsibilities as well. School curricula⁵ must be developed by the schools themselves. Schools must develop their own local curricula in accordance with the requirements of the National Core Curriculum and the examination requirements of the secondary school-leaving examination. The local curriculum is in fact a part of a more comprehensive, institutional document, the Pedagogical Programme, which schools had to draw up by 1998. The Public Education Act regulates the content of the Pedagogical Programme, so the responsibility of the school is embedded in a nationally defined framework here. The Pedagogical Programme contains the local curriculum, which must contain the subjects taught in various grades, the number of lessons for elective and compulsory activities, the requirements of the various subjects, principles of selecting course-books and resource materials, criteria for entering the following grade, forms of school assessment, the content of minority education. The local educational programme of schools and the local curriculum, which is part of it, takes effect on approval by the maintainer of the school. The selection of course-books is the right of individual teachers or the teaching staff. Teachers may exercise these rights in keeping with the Pedagogical Programme of the school. (Balázs-Halász, 2000).

2.5. Goals of the education policy

29. The goals of the education policy for the period at issue are represented the most extensively by the *medium-term public education development strategy of the Ministry of Education* that was created in 2003. After the diagnoses, according to Hungarian education policy, there are seven basic fields, which need the earliest possible improvement. The first is the development of the efficiency of education and basic skills, of which importance has been shed light upon by national surveys of the past years. The second significant problem is the existence of inequalities, furthermore, the assurance the equality of chances. The results of the research PISA attracted attention to the fact, that the differences in achievements amongst Hungarian schools are really high, that have direct connection with the students' social condition, the type of the settlement and with the region, city or village the school is. The third goal of the education policy is to ensure the quality of education and to evaluate it. The next capital aim is to improve the condition of the pedagogical profession and to increase the prestige of the teaching career. The demand for the spreading of the application of informational and communicational technology is getting greater and greater on different levels of Hungarian society.

⁵ The Hungarian law uses the expression „local curriculum”, but it refers to a school level curriculum.

The education policy has designated the provision of the material conditions as a central developmental field. Most institutes of the Hungarian public education need restoration, furthermore the state of the buildings and the equipments doesn't fulfil European norms. In most of the schools – mainly in small settlements -, the devices necessary for learning foreign languages are insufficient. And finally, the provision of the effectiveness and the improvement of leadership of public education are significant priorities, while the Hungarian educational system – compared to the efficiency of education - uses the accessible material resources characteristically without much performance. The improvement of the management quality on an institutional level occurs as a stressed device for the achievement of this latter aim. (Ministry of Education and Culture... 2004.)

30. The *Hungarian Lifelong Learning (LLL) Strategy* refers to the next strategic planning period between 2007 and 2013. The strategy of lifelong learning is a very complex developmental programme, that is in tight connection with several sectors, fields and parts of politics (e.g., public education, professional training, higher education, adult training, informatics, social politics, etc.), and it aims at the development and the improvement of the devices of the knowledge-based society. The priorities formulated in the strategy are: 1. The fortification of the equal chance-providing role of education and training, 2. The fortification of the relationship between education, training and economics, 3. The application of new governmental methods and public policy procedures, 4. The improvement of performance, the increase of the collective expenditure of education and training, as well as 5. The improvement of quality of education and training. The significant interventional areas that help to achieve the formulated goals are the followings: the development of basic abilities and competencies in public education, in other words, the realization of competence-based education, wide and abundant supply in professional training, in adult training and in learning at adult age; continuously increasing learning opportunities, career orientation, guidance, career observation, the acknowledgement of informal and non-formal learning, the assistance of the underprivileged groups and the groupings insecure in terms of labour market; and the domestication of a new kind of teaching/learning culture. (The Hungarian Lifelong Learning (LLL) Strategy)

31. In the recent and in the following years, the realization of the goals of education policy is enabled principally by the supportive system of the European Union. The goals of education policy could be accomplished when integrated into the frames of the Human Resources Development Operative Programme (HEFOP) of the first National Development Plan (NFT I.) between 2004 and 2006 elaborated in connection with accession to the European Union. Directly connected to the public education is the struggle of abolishing social disparities, helping the unprivileged to take part in schooling, together with the development of education and teaching as part of the lifelong learning policy. (HEFOP 2004-2006).

32. Within the framework of the second National Development Plan for 2007-2013 (New Hungary Development Plan - ÚMFT) the Social Renewal Operative Programme (TÁMOP) and the Social Infrastructure Operative Programme (TIOP) were elaborated within the authority of several sectoral ministries and even their realization is beyond the frameworks of the educational sector. The Social Renewal Operative Programme presented five priority areas in the autumn of 2006: 1. The improvement of employability, in other words, encouragement for the entrance into the labour market, 2. Improving accommodation, namely the orientation to the challenges of the labour market, 3. Provision of quality education and admittance for everyone, 4. The development of human resources within the field of research and innovation, 5. The affirmation of healthcare and the social participation, reception, (TÁMOP 2007-2013). The Social Infrastructure Operative Programme supports the moderation of regional inequalities of the human infrastructure, the improvement of the admittance, additionally the increase of the performance of human public services and the realization of their reform on the fields supporting education, public health, culture and participation in the labour market. (TIOP 2007-2013).

2.6. Trade unions

33. In Hungary, a process commenced in the late 1980s that resulted in the emergence by the nineties of a large number of trade unions protecting the interests of employees. This pluralism has also developed in the education system; thus, there are over thirty trade unions of various sizes acting in this sector. This pluralism has also developed in the education system, so today there are trade unions of various sizes acting in this sector. The most widely supported trade union among employees of public education is the Pedagogue's Union. In the public education sector, there are three other major unions, constituting, together with the Pedagogue's Union, the employees' side of Public Education Interest Reconciliation Board. One is the Democratic Union of Pedagogues, established in 1989, also representing the interests of those employed in public education, and most of its members are teachers working in the sector of education and teaching. It is a founding member of the union confederation Democratic League of Independent Unions. The other major union is the Hungarian Union for Public Education and Vocational Training, representing, in addition to those employed in public education, those employed in vocational training. The third is the Union of Hungarian Musicians and Dancers, coordinating those employed in artistic education.

34. As a result of the *pluralism in the union movement* developing from the late 1980's, a lack of cooperation was typical, especially in the early 1990's. It was rather difficult for unions to adapt to the social and economic changes following the political change. Defects in organization and problems related to the division of union assets created a crisis of confidence, and the result of this crisis is that just over one-fourth of employees in Hungary undertake union membership these days. Organization in areas employing public servants is higher; it equals 40 percent in the public education system. Despite all differences in opinion and disputes, it is a typical feature of the safeguarding of interests that the sector organizing the largest number of campaigns in the last decade was that of education.

35. There are comprehensive unions for the school leaders on the elementary school level. (National Union of the Elementary School Leaders) and on the secondary school level (e.g. National Union of Grammar Schools), the role of protecting of interests of some of them is significant.

2.7. Awarding the public opinion

36. According to a *public opinion poll*, *public education* does not belong to the priority themes of political and social debate. Hungarian citizens believe that the improvement of the economic situation and the reduction of unemployment should be the top priorities, and in relation to that, education is not a priority issue. One reason for that may be that people are relatively satisfied with education or, in other words, their aversion to other state-run public services is higher. The relative satisfaction concerning education change among different social groups. Well-educated people living in urban environments tend to be more discontent than villagers and less educated people are. Analyses reveal that Hungarian citizens made altering judgements on the standard of education in the past decade. In the early 1990's standards were found declining, whilst in the middle of the decade the majority thought it was improving, but this was not long lasting though, as the proportion of those who sensed a trend of decline increased a few years later. Towards the turn of the millennium, the number of those who saw improvement increased again, and a 2002 survey shows that the majority believe that standards are rising (Schmidt, 2000). The necessity of education is not doubtful for the society, on the other hand, social prestige of the teaching career and the pedagogical profession is comparatively low, and the importance of educational duties allotted to school is slightly presented publicly.

CHAPTER 3 – SCHOOL GOVERNANCE AND LEADERSHIP

3.1. Who are the school leaders in Hungary?

37. In order to analyze the issue of school leaders we need to define what we mean by the term school leaders. There are two different approaches:

- According to the position within the organization, we consider leaders as the ones who have a defined position at the school. A government order determines the most important positions in a school. (In a public institution –in case the government order does not dispose differently– the body of representatives of the local government, its general assembly and the leader of the institution or his representative are considered to be the highest leading positions irrespective of the institution’s administrative licenses. The leading positions are the following: leader of the institutional unit, leader of the partner institution, deputy leader of the institution, deputy leader of the institutional unit, deputy leader of the partner institution, leader of the department, the administrative leader, the leaders and deputy leaders of practical education and the leader of the work practice. (138/1992 government decree, 5 s(1))
- The second approach is according to the given task: we consider as leaders those who have specific tasks, specific functions, such as defining organizational objectives, organizing work, coordination of tasks and activities, decision making regarding personal matters, controlling etc.

38. In the regulations the approach based on position is the one that dominates but in the study we try to focus on the second approach, i.e. we consider as leaders the people who fulfil the above mentioned leader tasks, positions. At the same time it is very important to note that the Act on Public Education announces individual responsibility: that means the school principal is responsible for the efficient and legal functioning of the institution. Within exercising individual responsibility as included in the law it is the principal’s duty to draw in the members of teaching staff. In subchapters 3.2 and 3.7 we will deal with the issue of the distributed leadership, the role of the teaching staff and school heads.

39. In Hungary only teachers can be school principals. According to the public educational regulation the school head has to have at least a five- year-work-experience as a teacher and ‘in the Hungarian society of school principals there is a consensus regarding its necessity’. (Balazs-Szabó, 1998) The position of a school principal is regarded more as being part of the tasks of teachers, the highest step in a teacher’s career and not an autonomous leading or managerial task. The legal environment provides school principals great latitude (though in some places it is limited in practice), this way leading competences come to the front which might help in exploiting the possibilities of the institution. In managerial training programmes, plans the focus is on the improvement of managerial skills.

40. The position of a school leader is influenced by the authority responsible for his appointment and replacement. During socialism the appointment was ‘from above’ that is why the position of a school leader was regarded as entail (Balazs-Szabó, 1998). Since 1985 the authority of a school principal has derived from the right of veto of the teaching staff. Since 1990 (since 1991–the abolition of the right of veto) it has derived from the maintainer of the school, depending on the institution, from the local or county government, church, foundation and other maintainers (as an institution for higher education, private company). The appointment became ‘the local responsibility of local actors’. This way the school principals were deprived of a uniform way of exercising authority which was ensured ‘from above’ and ‘from outside’ but they were enabled to prevail as personalities, professionals, institutional politicians.’(Balazs-Szabó, 1998) This emergence because of limiting conditions which will be dealt with later on, is not at all autonomous.

41. The cultural environment is suitable for a leader to emerge from a teaching staff and become the real leader of the institution. It is proved by the Hungarian results of the GLOBE surveys, which show

that even in the world of school there are large distances between the extents of authority, which makes it possible from cultural point of view for the leader to emerge. The GLOBE (Global Leadership and Organizational Behaviour Effectiveness) leadership and culture research expands over 62 countries. There are over 1000 Hungarian participants, among them there were people working in public administration, but not representing directly the educational branch. The Hungarian results show that the distance between types of authority is great, 5.56 on a scale of 7. This means we accept inequality, autocracy, centralization. 'May the leader, the central authority tell us what we should do, that is their duty. Let them tell us and then we'll carry it out.' (Baráth-Cseh, 2002)

42. Innovative models show us that in many schools principals become real leaders, using legal autonomy at a large extent, they succeed in managing the teaching staff and the institution. We will deal with the innovative models in detail further on. We can ascertain that a school principal can emerge from the teaching staff if he is charismatic, and/or (rather and) if he or she efficiently provides the resources necessary for operating of the institution.

43. In spite of the supporting cultural environment many principals can't or do not want to manage the teaching staff. One of the reasons for this is that the majority of institutions lacks in resources, thus there is no possibility for a differentiation of salaries. This is further on enforced by the status of teachers as public employees, which also limits the possibilities of the leader. For the maintainers often the main viewpoint is to secure the functioning, thus they don't demand the achieved results, as a result leaders are not interested in solving the problems, assuming responsibility in case of conflicts. As a result of all these the authority of the teaching staff is greater than what is shown by legal boundaries. Though principals have the possibility to give orders in practice they rarely make use of it.

3.2. Legislative background concerning school governance

44. The model of Hungarian public school governance developed in the 90's was greatly decentralized. Schools are very autonomous, the school defines its educational programme, its curriculum (based on the National Core Curriculum and on frame-curricula). The school head makes decisions about the appointment or replacement of teachers, about salaries-higher than those of public employees and together they make decisions about the teachers' professional development. They freely decide on enrolling students (the only limit is that primary schools have to enrol students living in the school area). Hereinafter we will take a closer look at regulations which enable the autonomy of these institutions.

45. The structural characteristics of the educational system are determined by the Public Education Act (Act LXXIX of 1993 on Public Education and the Act 1992 XXXIII on Public Employees and its government decree 138/1992). Besides these school leaders are controlled by several other decrees: the MKM decree 11/1994 (VI.8.) on providers of professional services (work plan, organizational and operational statutes, the school rules, leadership assignment, professional teams of teacher teaching the same subjects, teaching staff), the 3/2002 (II.15.) OM decree on the improvement of quality and the frame-curriculum, the 40/2002 (V.24) OM decree on secondary school-leaving examination and others.

46. The Act on Public Education defines what the responsibilities of a head of a public education institution are. The leader of such an institution is responsible for the efficient and legal functioning of the institution, for economical administration, he exercises employer rights, and he makes decisions regarding matters related to the institution, which are not assigned by law or collective contract (public employees regulation) to somebody else's jurisdiction. He conciliates issues regarding employments, working conditions according to legal provisions. Further on the leader of an educational institution is also responsible for the work of teachers, for the proper functioning of the institution's controlling, assessment, evaluation, and quality management programme, for taking measures for child and youth protection, for organizing activities, for providing health and safety conditions suitable for education,

for preventing children's accidents, for providing regular health check for the students. [...] (1993 LXXIX. Act on Public Education 54. §)

47. The Act on Public Education disposes of defining the main tasks of the school principal. His duties include: leading the teaching staff, managing and controlling the educational work, making decisions which are responsibilities of the teaching staff, organizing their carrying out and controlling. Besides these the tasks of a leader include cooperation with the school board, with labour unions, student unions, with parents' associations (communities), managing child and youth protection measures, activities for preventing children's, students' accidents, assuring human and material resources necessary for the proper functioning of the educational institution based on funds at his disposal. (1993. LXXIX. Act on Public Education 54. §)

48. The law except for listing the exact tasks lets the institutions develop their inner work structure at their latitude. The ministerial decree 3/2002. (II. 15.) on quality assurance and quality improvement limited to a certain extent this freedom. The main objective of the decree is to define tasks related to the development of the system, with the improvement of the quality of educational activities in schools, of the performance of quality, quality assurance and to earn the possibility of state recognition of the achievements in the field of quality improvement. The quality improvement programme has to be approved by the maintainer of the institution, for this reason the autonomy of the institutions decreased a bit, but the improvement of quality became the inner responsibility of the institution. The maintainer also has to approve the organizational and operational statutes and the school rules determining the inner functioning, and the school educational programme. Although the maintainers indirectly have the possibility to monitor they rarely do so. In most cases they only make objections if they don't have the necessary funds for the programmes to be started that occurs quite often due to the system of financing.

49. It is impossible for the school heads to avoid *cooperation with the teaching staff* while ensuring the proper inner functioning because out of the four important documents, three (organizational and operational statutes, school rules, quality management programme) are created by the leader by law and are accepted by the teaching staff. The Act on Public Education does not dispose of the making of the school curriculum but only of its acknowledgement (by the teaching staff) [...] The teaching staff with a large power and the existence of a leader with a wide range of tasks but a smaller area of authority is characteristic which motivates leaders to constant matching while creating strategic documents, making decisions regarding functioning. (Balázs-Palotás, 2006: 2.5.1.) According to the Ministerial Decree 11/1994 (VI.8.) the teaching staff develops its own processes concerning operating and decision making. The meeting of the teaching staff has to be held on demand of one third of its members, the members have the right to form opinions concerning the use of funds for work perspectives, investment decisions, in formulating the demands for exams.

50. For the enactment of documents – as we mentioned before – needs the *approval of the maintaining local government*. The school principal is responsible for the implementation of the documents i.e. the purposeful functioning of the school. From leading point of view the extent to which he or she can influence his / her employees is very important. Theoretically it is the school principal's authority to select and monitor teachers but in practice this is limited. The main reason for this is the status of school teachers as public employees.

51. The *Act on Public Employees* concerns on the one hand the school principal, as regulations are valid for him too, on the other hand it concerns his job as a leader, as he has to lead public employees. Law protects to a great extent the position and personality of public employees in Hungary. One can only dismiss a public employee due to disciplinary proceedings or referring to restructuring (very brave school leaders venture to undertake such 'adventure' taking into account possible consequences of labour law). Thanks to lobbying of the trade unions teachers have the obligation to teach their classes, but they don't have to spend any more time in the school building. Salaries are fixed, there are compulsory regulations for the bottom salary limit, but because of lack of funds this usually means top limit too. Performance based payment and financial motivation are restricted. Their reasons are on the

one hand lack of funds, on the other hand they lie in individual unpleasantly related to the measurement and evaluation of performance, or in the lack of managerial experience and skills. Later on we will deal with the effects of public employees' existence on evaluating and influencing individual performance.

52. The Ministry of Education and Culture is responsible for improving regulations. Among the professional establishments which enable educational-political decision making there are two national educational bodies and within these the participants are representatives of leading professional organizations. The National Council for Public Education (OKNT) is a professional body having rights of decision opinion and proposal making in the domain of public education. Out of its 23 regular members and its 8 alternate member, 10 + 3 are representatives of national professional organizations who are delegated for 5 years on proposal of the concerned organizations (the representation of professional organizations in the OKNT is possible every five years). The National Council for Public Education Policy (KT) helps the Minister supporting decisions, counselling and making proposals in the filed of policy related issues. All major national, professional, governmental, civil parties interested in public education are represented in the KT: teacher associations, teacher trade unions, parental and student organizations, local governments, minority governments, and non governmental school maintainers. The organizations compete with each other in order to take part in these two main bodies.

53. Besides the above mentioned channels some professional organizations strive to get involved in developing the national educational policy, to influence directly the given field of force. After the change in the system these organizations boomed, but ever since their number stabilized and it is obvious which of them are able to pursue their objectives efficiently. Besides the national organizations dealing with the specific issues of school leadership (National Association of Primary School Principals, the Hungarian branch of European School Heads Association, whose members are mainly vocational school leaders) we should mention some other organizations which are not necessarily concerned with leadership only but they are the fore-grounders in school restructuring (The Association of Foundation and Private Schools, Self-developing Schools' Association, Grammar Schools' National Association).

3.3. Challenges concerning school leadership

3.3.1. Efficiency challenge and possible leader's answers

54. The main policy-challenge for the Hungarian public education arises from quality and effectiveness issues and partially related to these from the inefficiency of the whole system. The main reason for efficiency issues is the material and human capacity surplus in schools, as a result of a decreasing birth rate and the regulations have not been and still are not favourable for this situation.

55. Due to normative financing and to the demographic situation the main aim of schools is to 'fill up' the places. The number of groups starting in an institution indicates the institution's future perspectives. As one of our interviewees stated: 'those who can start one group only are in a life-threatening situation'. This powerful competition model motivates school leaders to assure the starting of grades/classes.

56. At the beginning of the 90's the strategic reaction of certain institutions, that is expansion, made a contribution to the preservation of the capacity surplus. Through expansion from top to bottom or vice versa they tried to attract enough students to the schools, adding a new dimension (between age-groups) to the Hungarian educational competition model. The expansion was hardly coordinated and the maintainers didn't undertake to manage more powerfully, because the population, the society of parents did not stand up for the closing of schools. The fight for students occurred between levels

ISCED 2-3, because structure changing programmes for educating the elite (grammar schools for grades 8th and 6th) allured students from the upper grades of primary schools⁶

57. The other institutional strategy has been and is still nowadays the diversification ("standing on several legs"). The institutions following a diversified strategy created a mixed qualification section (primary, secondary and vocational). The question is whether this strategy is defined as a mixed one suffering changes year by year or as a flexible "standing on several legs" model that conforms to economic-social demands. The first one is more common, but the second one can not be excluded either, there are living examples for it mainly in the innovative schools in the areas of economic depression.

58. Although creating a qualification section improves the institution's financial situation, the leader gets into a situation difficult-to-lead within the institution. There is no way to mix the good and bad students from different sections/courses of study firstly because of the parents' expectations, the parents would their children to be in a "good milieu" and if necessary they change the institution. The pressure to separate good students from bad ones exists in primary schools too, parents being allowed to choose freely among schools are in a strong position to bargain. As a result school leaders have to preserve segregation within the school for the sake of financial stability. The public opinion becomes aware of the existence of this difficult issue when there is a scandal presented by the media. For approaching the issue as scandal through his parental attitude he assents to the ongoing situation.

59. Maintainers have had and have difficulty to face the institutional-rationalizing compulsion. We can come across examples of these in bigger settlements,(mainly seats of counties), districts in the capital where the school maintainers have enough resources to face the material consequences of reduction, and where a rational local planning provided suitable perspectives for the institution, by making institution leaders partners (as in the case of Kőbánya, one of the districts in Budapest). Besides rationalizing the efficient way to exploit resources, undertaking common and new tasks, can be found in the case of public administrative associations or different associations in smaller areas, districts, school associations. They sporadically appeared in the 90's, but their expansion was hindered by arguments related to the administration of regions, insecurity and constant change of control, political mistrust towards small regions, also characteristic to small schools. In subchapter 3.8 we'll discuss the issue of cooperation in the different regions.

3.3.2. Challenges to increase sensitivity towards performance

60. Opposed to the traditional subject knowledge the focus is on developing competences due to the requirements of the labour market and the concept of lifelong studying. The PISA survey made Hungarian scientists face a more unfavourable achievement rate than it was believed by public opinion. On the level of educational politics there was a debate about its causes (and the causes of the differences between schools). As an influence of the research they started to focus on the main competences instead of cognition in teaching. The teaching staff hasn't become aware of the fact yet that it is related to organizational techniques, methods used in Hungarian schools. The second issue which people have to become aware of is that of the differences among schools, because of the homogeneous parental-social background that influences achievement. This might cause opposition. The national educational politics has taken administrative measures concerning the main fields of leadership to change the composition of students in a school (compulsory enrolment of student living in the school's area, in the case of too many applicants and lack of capacity, the students at a

⁶ Due to decreasing student number primary schools extended their grades up to the 12th, grammar schools to grades 8th and 6th. The educational model comprising 8th grades was established in 1988 by a government order of the Ministry of education before the change in the system. In some primary schools within the Hungarian public education the 10-grade-originally soviet model was used, in others they turned back to the 6-grade-model.

disadvantage are favoured, the rest are drawn by lot). These measures have not been introduced yet, but starting from the parents' earlier attitude they don't seem to be realistic.

61. The *national competence assessment* (OKM) since 2001 and the new type of secondary school-leaving examination introduced in 2005 provide feedback for schools about student- and through students about the institution's performance. The OKM organized by the Ministry of Education and Culture carried out standard performance measurement in the main subject matters, four times: in 2001, in 2003, in 2004 and in 2006, each time on a different level (5th and 9th grades, 6th and 10th, and twice 6th, 8th and 10th). The main objective of these surveys is to develop the school's evaluation culture, creating new means and methods for institutional development politics. In order to manage performance challenges, the *new standard system for the secondary school-leaving examination* introduced in 2005 provides further opportunities. The results of the examination are not public but the institutions concerned are aware of them; the possible bad results have no external consequences regarding the institution (About these tools we will discuss more in subchapter 4.2.). It is the school's choice, the leader's choice in the first place how to use the results of the OKM and secondary school-leaving examination in the institution. One option would be the quality development programme – these programmes had to be improved after introducing the new secondary school-leaving examination system. The processing of the competence assessment results would be an important tool in the school quality improvement politics.

62. The performance measurement on school level in the form of compulsory quality management programmes starts to develop nowadays. Although in many schools quality control is considered an administrative duty, rather than a device for the professional-pedagogical development, the institutions belonging to the group of innovative schools, participants in the former "pilot programmes" take quality management very seriously. The system of professionals, non-profit and for-profit organizations, which developed in the Hungarian public educational system, in an area supporting school improvement, have an important role in the institutionalization of institutional quality management. To draw in these characters depends on the financial situation of the school's maintainer, and on school applications and success. The new manager-training programmes and in-service teacher training models include the improvement of measurement-evaluation competences.

3.3.3 Challenges of teachers supply, motivation of teachers

63. After the change in the political system one became aware of the importance of education, acquiring a degree became an important goal for many. The mood for further education is constantly increasing, the amount of places for high education are four times the amount in 1990."Nowadays 50% of high-school graduates apply for studies in higher education. The beneficiaries of the expansion of high education were those institutions where they taught "lacking professions" (in the first place economics, law), educator and teacher training turned out loser. The number of applicants did not decrease but the applicants qualifications and motivation did. The background reasons are that the earnings of a teacher decreased compared to those practicing "fashionable professions", and this followed by a diminution of the teacher's prestige in society. The poor results achieved by applicants to teaching positions show that the prestige of this profession hasn't changed. On the other hand, most of the undergraduate students chooses subject necessary for teaching for so-called safety reasons. Young teachers have a hard time to get a position at a school because the more experienced ones due to worse life perspectives don't leave their jobs not even after retirement age. The career of an educator was more and more limited in the past ten years. (Nagy, 2004) The pay raise in the recent years improved the situation a bit, they were just able to stop the ongoing worsening tendency. It is important to note that the pay raise from the point of view of lacking achievement expectations had a bad effect, because the pay raise was not accompanied by performance requirements, it was like "a present".

64. Besides limited possibilities of material motivation, non-material motivation such as career management should play an important role. The non-existing career ladder in a school is a serious problem (there are no positions such as "leader-educator"), and that the management on middle level "was omitted". The amount of bonuses decreased the extra work of deputy principals, head teachers can't be paid for. For example, the amount of the bonus of the heads of professional teams of teachers teaching the same subjects is 9-22 Euro per month, that of the heads of classes is 22-44,5 Euro in 2006. While the schools are not budgeted for by the maintainers to pay for those in leading positions, the school leader in most of the times can legally save a minimal allowance out of the budget. This way the amount of allowance is not proportional with the assumed load. For demanding educators there is a possibility to have a professional career outside the school but still inside the framework of education, indirectly through different roles (primarily we should think of different forms of expertise).

65. While the legal number of lessons per week in Hungary is between 40-42, in public education the compulsory number of lessons is between 20-23 (irrespective of school level, type of institution or subject, while not differentiating between the different extra amounts of time). The education law increased the compulsory number of lessons by two lessons in some teaching jobs in 2006. According to law regulations it is compulsory for school teachers to spend the required number of lessons in the school only that is why some of them reduce their work to the level of a lecturer. (OPEK, 2004:58) The occasional tasks which are not included in their duties fall on occasional leader decisions. The unequal division of labour (some work a lot) leads to unfavourable erosion processes, which must be solved by the leader. (OPEK, 2004:57)

66. Under such circumstances (taking into account things mentioned above about employing public servants) leaders face lack of motivation. The fact that the leader instructs or can instruct is not an obvious item of the school's functioning. The school as institution lacks hierarchy, - because of unfulfilled achievement requirements- it can not be considered as something positive. One of our interviewees stated that: "school leaders nowadays can not instruct, they can only demand." They would need to improve their motivation and communicative competence in order to succeed and use their authority given by their position.

3.3.4 Technological and pedagogical challenges

67. One of the important programmes of educational innovation was the training programme started by the Soros Foundation, within which teams of three were helped to develop their institutional educational programme based on the National Core Curriculum. This was the starting point for the Self-developing Schools' Association. (<http://www.onfejlesztoiszolak.hu>).

68. In the Hungarian school system-firstly because of a high degree of decentralization-there is a segment of innovative schools, around 10-15% of the institutions can be considered pioneers in introducing educational innovations. Altogether one third of the institutions are open to innovations. The school's participation mainly depends on the school leader. It is a challenge for leaders to arouse and maintain the school board's interest for innovation from tender funds and to be able to use the innovation on a daily basis.

69. At the moment a challenge for innovation occurs in two specific fields, in the field of foreign language learning and info-communicative technology (ICT). Both of them are assisted by government programmes (though these mainly concern the development of infrastructural conditions). It is a challenge for schools to introduce these fields to their daily educational routine. In Hungary the ITC achieved the digitalization of subject material. One of our interviewees pointed out that the material is digitalized but traditional. The question of how an institution can accept ICT, and develop ICT competences was not dealt with thoroughly, and in his field innovations are sporadic only.

3.3.5 The effects of the accession to the EU

70. Hungary has participated in the European Union's educational programme since 1996 (in leader, teacher and student exchange programmes abroad, common development programmes). The institutions taking part in EU programmes emerged from institutions having a tendency for innovations, national development applications. Their growing number leads to the growing openness of the system.

71. The effects of accession to the EU occur in development-political priorities. Among the different sectors public education does not get enough attention (compared to hygiene, infrastructural development). Still, in the area, Hungary spends the most on public education development because the concept of "lifelong learning" is advanced which made possible the development of the educational branch in a wider socio-economic context. It is still not known whether the available resources will be used purposefully and efficiently.

72. In the first period of EU support between 2004 and 2007 the central programmes of content and methodological education development were started and the regional institutions (Regional Centre for School and Kindergartens Development - TIOK and Regional Integrated Centre for Vocational Training - TISZK) that use them were established. The only challenge for institution leadership was the possibility to join the network of institutions that already used the programmes. Schools, institutions and consortia could apply for the adaptation, use of central programmes. There was the opportunity of calling for institutional tender in the regional operational programme supporting the development of educational infrastructure; the leaders of those schools that were successful at the calling for tender could get significant resources. In the second development plan for the next period between 2007 and 2013 - which is the main development political document in the EU's structural supports - we can count on developments based on the former ones, but decentralized, related to lifelong learning and employment policy and further common developments (between branches) concerning social activities. In the strategically founded programme plan the issue of school leadership improvement could be a central theme. The education policy became aware of the importance of leading and institutional development in improving competence-based lifelong learning.

3.3.6. Fast change of the legal environment and the adaptation of the persons involved

73. After the change in the political system the persons involved in public education suffered continuous change, this meant a constant pressure for adaptation. Analyzing the attitude towards change we come to the conclusion that change teaches us how to survive but not how to bring about changes. One of our expert interviewees said: "the swings at election cycles reinforce the persons involved that it is no use making huge efforts, because as some change occurs, another one is already expected to come. The persons involved in the Hungarian school education learnt the lesson how to meet the requirements in a formal way without causing deep-rooted changes within the institution.

74. There can be said that the school leader is exposed to cross fire. While supporters and the financing system are putting pressure from above for a more economic, efficient function, the adaptation to an ever-changing environment is impeded from below every aspect of public servant being of the pedagogues. From these succeed – that person can become a successful principal – who can increase the school's and pedagogue's area of action by drawing in additional sources.

3.4. Levels of school administration and the role of maintainers

75. On local and county level, the public education administration fully integrated into public administration system, there is no independent educational administration or inspectorate. In the decentralised public education governance system, school's independence is large; the area of movement of local government is average: its influence is developed mainly through financing, when complements state normative with sources indispensable for schools. Its professional leading role is developed in the way that approves documents necessary for the institute's function. Capacity planning materializes on this level: the maintainer decides about school openings and closings respectively, about development. Regarding the relation between school leader and local government, the latter nominates the school principal, but becomes principal the person supported by the education body.

76. Local government has, in case of most of the schools the maintainer's rights. The law places to the local level the maintenance of general schools, while in case of secondary schools and some vocational schools (e.g. art schools) it is compulsory on a county level, while it might be done by the local government. In accordance with the pluralism of maintainers, the law also guarantees the non-state institutes' support. These institutes can also receive, beyond state support, resources from local governments; for church institutes, the state guarantees that would give the supplement with what local governments, on average, complete their own school's quota. Concerning financing from the budget, there are no differences regarding size and type of schools, the state gives financing to the maintainer local governments within a student-based normative supporting system. However, this raises the importance of finding the "economic size"; because of the variant situation of maintainers, this could lead to major differences, regarding real financing sources of schools. Based on experience, normative financing only covers 50-70% of schools' expenses. (Balogh-Halász, 2003:93) Thereupon, local governments contribute to the functioning of local public education, from other sources of income. The successfulness of the contribution very much depends on the size and the combination of the institute network that differs a lot according to the type of the settlement. Also on this depends how well can local governments control, guide their schools. The differences between financing and maintainers' expectations have an effect on the area of movement of school leaders, their professional situation and jurisdiction and on the expectations from them. The leaders of the schools maintained by local governments essentially are important characters of local politics. Its spectrum may expand from the membership of the assembly of the local government to any forms of lobbying.

77. Major cities and districts of Budapest are those actors of the system, who function more than one institute, and they have the competency for school governance and management (local governments have education departments, with specialized employees). Mostly, these types of settlements are, who developed local policy regarding schools, have a more conscious way of thinking about the future of the institutional system. Development and capacity change decisions are not taken only based on professional viewpoints.

78. In case of towns, maintaining schools entail a far greater burden to local budgets. The attitude of local governments toward schools can be of two types: they regard the school (mainly grammar schools) with local pride, they will maintain it anyway, because of prestige. The other type (is characteristic mainly for vocational schools providing no secondary school-leaving examination), is that they try to get rid of it, and transmit the maintenance rights to the county.

79. From the viewpoint of maintainers, the situation of small settlements is the most disadvantageous: local government attempts to fulfil all the (not only education related) assignments with only a 1-2 member apparatus, they are unable to attend any school governance – mainly professional - issues apart from the basic economic transactions and legal representation.

80. Besides regional institutions (teaching arts, professional services), counties' local governments mainly maintain old-type, skilled labourer forming institutes. This causes them to possess the most maintenance problems and the institutional portfolio least desired by the local government.

81. However, since 1996 county governments have to prepare county development plans for public education, this is not compulsory for schools maintained by local governments – especially in cities with county-rights (the ones that function in county towns) are against it. That is why the conceptions developed have little influence on institutes that belong to the county. In the past ten years, the local system of planning became more complex, the coordinative role of the counties – the initiation of local, micro-regional and county relations - improved a bit, but the coordination of the plans still depends on the parties.

82. While micro regions (NUTS level IV) have been improving in general public administration and in regional education control since 2004, in the future, micro-regional level planning shall have a greater role. At present, is questionable what the role of the EU's "preferred" regions (NUTS II) - which have only little active institutional system in Hungary - will be in public administration and development, what is already visible is that the change of governance and planning at institutional level will require a different type of development policy.

83. The central government, by determining the frame of activity (through the determination of frame-curriculum on what local pedagogical groups are based; of basic laws concerning employment of pedagogues, stressing out the number of compulsory teaching lessons), respectively – more often – by standard measurements of pupil's results (competency assessment and uniform secondary school-leaving examination requirements, see more in Chapter 4) tries to influence the participants of the system. Out of the factors to be investigated, it has the right to decide only in connection with the amount of the financial normative – on the other hand, with this power it can affect schools only indirectly and limitedly, especially where the resources of the local government cannot sufficiently influence this phenomenon.

84. The maintainers' rights of church schools, foundation-schools and private schools are exercised, instead of local governments, by the founders, and while they are on similar footing with local institutions regarding financial aspects, different kinds of regional planning documents don't take their operation into account.

3.5. Organisational solutions in school governance

85. By examining the connection between school leaders and governing bodies, worth examine the role of governing bodies within and out institutions, their scope of duties and sphere of authority. Outside the institute, the most important governing body is the *maintainer local government*, which has mainly influence on economical issues. As said before, the main school-maintainer local governments have an important contribution to school maintenance. The maintainer determines the budget of the school; institute functions according to the rules of budget management. On smaller settlements happen that – because of the size – schools do not have economical autonomy. Formally, this means the decrease of the financial autonomy of the schools, in practise this does not mean decrease, because in the school's budget after resolving personnel expenses and expenses regarding the functioning of the building, the remaining sum is too small. (Baráth–Cseh, 2002) In the micro-regional partnerships getting formed since 2004, the independence of the schools transforming into member institutes decreased.

86. Maintainers can exercise professional supervision trough the quality control systems made compulsory by the public education law, who fulfilling their obligations could examined the institutions maintained by them. An empirical research revealed that in cities local evaluation system based on measurements was formed in only one place; this happened years ago with help of

competition sources and external experts support (Balázs-Palotás, 2006; Sinka, 2005). This means that on the field of institute evaluation, the biggest institute-supporting local governments have not yet formed local evaluation system, and this is probably true as for towns as well. Professional controls external evaluations effectuate in certain periods of time are actually of ad hoc character, their usefulness can be considered low (Balázs-Palotás, 2006) - this happened in spite of the fact that the public education law from 1993 already contained the local government's assignment regarding evaluation and this prescription became more concrete with the 2003 legislation change. According to one of expert interviewees "it is visible that is not about a new element in the system of public education, because the obligation is permanently present in the regulation, but the maintainers – because lack of sources – maintainers committed infringement of the law. They verified the most critical areas for them – management and legislation – but less attention was oriented towards the evaluation of professional work". The 2006 modification of the education law increases the school maintainers' professional evaluative responsibility, while they get the results of the national competence assessment from the National Public Education Evaluation and Examination Centre (OKÉV), and if any of the schools maintained by them doesn't fulfil the minimum demands - from the 2006/2007 assessments –, they are obliged to arrange the matter of that school. However, since – lacking the appropriate developmental programme – the arrangement plan of the school functioning under the minimum in the following year again should be done under the control and with the permission of the National Public Education Evaluation and Examination Centre, and its fulfilment is investigated by the authorities, and local governments are allowed to lay the responsibility upon the state.

87. In Hungary, there are no compulsory inspectorates, maintainers are able to attend these assignments with the aid of *accredited experts*. They can freely choose the expert they would like to work with. There can be said that trough this a "private" inspectorate system develops. That tightly fits to the legislator's effort that stresses out the importance of local decision-making.

88. According to legislations, within the institute the *school board* has an important role, as a tutorial and interest reconciliation forum. "With the 1996 modification of the Act on Public Education was formed the institution of school level reconciliation, the school board, its composition and responsibilities. The number of the maintainer's representative diminished to one, their place was taken by the representatives of pupils. Ceased the previously compulsory character of establishing the body. Its most important jurisdiction is that is compulsory to ask its opinion when accepting pedagogical programmes (Halász-Palotás, 2003). The body has the right to express its opinion but its function and real sphere of authority mainly depends on certain institute's inner function. In consequence, the leader indirectly – while preparing and excepting documents that determine the inner function –, and directly – taking into account the opinion of the school board in certain cases while deciding – may have a major role in determining the responsibilities of this body. "Although legislation changes continuously widen the jurisdiction of the school board, this body without any tradition in our country, at present only in few institutes has the role it deserves. Regrettably, a still present phenomenon is that most of the pedagogues does not like if "outsider" (and parents are still regarded outsiders) has the opportunity to interfere in the school's life. Parents can be withheld by the fear of reprisal in opinion forming". (Halász-Palotás, 2003)

89. "The school often uses the institute of *student union* in inner conflict management. In general, they use the assistance of this body only on those problems that create difficulties for pedagogues. The work of student union is hardened by lack of money, time, information, energy and lack of interest. These impeding factors only apparently are independent from each other. The only income for student union are programmes (tea afternoon, student party), and this tightens their activities so for interest representation, conflict managements, reconciliation, examination of house rules, practice of right to an opinion, they don't have enough time and energy". (Halász-Palotás, 2003)

90. The legislation regulation about school leadership, in the future, cannot be expected determinative changes; the preponderance of local elements will remain in the future as well. Because the EU

adherence, there will be another level between national and local: the regional level. Nothing sure is known yet, about its influence upon the field of maintainers and financing.

3.6. The latitude of the school leader

91. As it turned out from previous chapters, the institutional and legislative environment assures grate autonomy to certain educational institutes and many of them were able to live with this autonomy. “It was continued the learning process started more than a decade ago during which more and more characters were able to find their place within the decentralized leading conditions” (Halász-Palotás, 2003). In the same time, the problem is that the process remained unequal: “while certain characters’ problem solving capacity greatly improved the others’ had hardly changed” (Halász-Palotás, 2003). The cause of this can be found in the fact that while the principle regulation gave sphere of movement to introduction of all kind of innovation for achieving performance, the financial problems became a barrier; motivation is diminished by the lack of performance assessment and undefined responsibility for performance. (Practically the leader’s inner motivation is the driving force).

92. According to the above mentioned, it is hard to interpret in the Hungarian system the harmony between possibilities of action of schools and leaders, sphere of movement and responsibility for pupils performance. Only lately, the standardized measurement of pupil performance started and the feed back mechanisms towards institutes are not formed yet. Maintainers – as said before – put forward the economic indicators in spite of pedagogical performance. The wide autonomy of educational content and form definition goes together with lack of responsibilities for results; so a lot depends on the ability of the leader on how well can convince the institute to developments that lead to result improvement and changes. Because of the causes enumerated in the previous parts (financing public employee status inner operational rules, motivational problems), even really innovative and motivated leaders have a hard job.

93. The only and important maintainer expectancy from school leaders is to fit into the budget. Because of the flexible budget the schools do not have to fear of bankruptcy, the long lasting bad activity results make maintainers to think of capacity regrouping. The schools strategic reaction to the introduction of headcount proportional financing system, was already presented in subchapter 3.3.1 – has to be added that school leaders are tied up in the management of human capacity. With the defined headcount management, maintainers take away the possibility from leaders to assure, for extra work done by employees, extra income (and thus extra motivation) for pedagogues. On the side of the maintainer instead of headcount, a salary frame prescription would be a positive step, which would lead to the improvement of balance between responsibilities and jurisdictions.

3.7. Internal organisation and leading structure

94. Within the school certain leading scope of duties are well specified, the attendance of these can entitle to supplementary allowance, so by the law there is a wide space to divide the leading assignments. A lot depends on the principal, the relation between the principal and other characters that function in the school, the organizational culture of school, on the fact that within the possibilities given by the law on which areas how wide and deep responsibility dividing structure is created and operated, namely how wide is the group of those who attend leading assignments. But if the attendance of leading assignments does not prevail a commonly agreed, deliberate responsibility dividing, it can easily fore come the situation that against strong organization stays a weak principal, with only formal rights. This is also possible because of the institutional autonomy, the teaching staff has right of decision in important scope of duties.

95. Regarding *distributed leadership*, *deputy school heads* have an important role, who, regardless the size, type of schools, number of students and inner regulations, can have different number and different scope of duties. Institute leaders can decide in what ways and manner they delegate assignments for deputy principals. Examining the number and duties of deputy principals, can be said that in bigger and multi profiled – for example grammar school and secondary vocational school, multi professional trainings from ISCED 1 to 3 a, b level – institutes deputy school heads are responsible for the functioning of a level and in these schools we find economical directors, who is one of the deputies of the leader. Schools that function with member institutes, the leaders of these member institutes work in deputy school head position. Schools that have colleges, the leader of the college are mostly deputy principal. Where the pupils of educational institutes or a part of them is pupil of an independent college, the legislation disposes about the relation between leaders of school and college.

96. For the inner governance of the institute, principals rely more and more on their deputies, in numerous schools the fulfilment of strategic assignments is delegated to deputies. According to a survey in only half of the schools principals deal with curricula issues (and let assistants and teaching staff to deal with other problems). In matters of in-service training and school-in, decide deputies rather than principals. There is only one area what principals strongly control: the issues of pupil discipline. (Balázs, 2004) Its interpretation is not so simple; it can either denote the demonstration of power or the teaching staff release from responsibility.

97. Examining the structure can be said that, characteristic to institutes is the *flat structure*. The attendance of assignments belonging to middle-level management represents a problem in many schools. One of the main reasons is that the teaching staffs are not motivated to attend these assignments; the incentives are missing (as we have dealt with in subchapter 3.3). One other reason is that, however principals are considered employees of teachers, their possibilities to sanction and instruct are very limited. Because of these, one of the most important assignments of school leaders is to convince the middle-leadership about the importance of the development targets, for which beside leader charisma is necessary to obtain material sources. "A major part of school principals (65%) regarded the group of middle management, heads of classes and heads of professional teams of teachers teaching the same subjects, as one that has to be developed" (Farkas–Marosváry, 2002).

98. This situation is greatly improved by the *quality management system* introduced in most of the institutes, according to the law. Thank to this "in most of the institutes has developed a professional circle with new competencies that as supporting group, is situated between leadership, educational staff and the traditional professional teams of teachers and in one certain area directly guides the activities within the institutes. In reality a new inner guiding level was formed. It influenced the assignments of leaders as well: he/she can delegate the preparation of the decision to this new organizational level, to which mostly relates an assistant principal. The new organizational structure developed to guide the quality control system, forms the structure more shaded, makes the leadership more professional and partly gives a new inner career possibility to pedagogues." (Halász-Palotás, 2003)

99. The *professional teams of teachers teaching the same subjects*, which number, professional area and form of function are defined by the institute, have a role in the leading of professional work in educational institutes. These professional teams - whose leaders are nominated by the principal – can have an influence on important areas of professional pedagogical activity. Their proposals, after discussing with the education staff, are accepted by the principal. The spectrum of their activity may include the proposing of a motion in the questions delegated by the education staff (for example choosing the school equipment) or even the choosing of in-service training programmes of their profession and the area of study competitions.

100. The *class head*, who has the central part in the education, has to be examined as well. The introduction in the second half of the 90s of the National Core Curriculum ceased the compulsory character of the form-master function, the keeping of this function and filling it with content was made dependent on schools. Within the 1999 frame-curriculum, the form-master class was again compulsory

but the exact definition of the form-master's sphere of activity did not happen. Another problem is that the form-master supplement is low and so the extra work is not adequately paid.

101. The weight of the class head function has decreased in the past years. According to a survey from 2002, from the previous 100% only 84% of schools have a professional team of heads of classes, only 83% take part in preparing the school level pedagogical programme and in only 73% of the programmes is formulated the functions of this professional team. With colleagues teaching in the same classroom only 27% of heads of classes have regular connection (in general schools and in the province this ratio is better than in secondary schools and in the capital). (Szekszárdi, 2002) The continuation of this trend may lead to the query of the reason for the existence of the head of class function.

3.8. Network-type cooperation

102. Within the educational administration, two basic types of network cooperation can be distinguished. One contains the networks for regional duties of public education that aim towards common functioning of educational institutes and exploitation of economical and/or professional advantages of this cooperation. The second type of cooperation contains networks based on professional development, application of innovative pedagogical concepts and experience exchange.

103. Different forms of cooperation in Hungarian public education characterize the period after the change of regime. School level collaboration in the first half of the 1990s did not characterize the system because of the school independency was increased by the law of the local governments, the possibilities of autonomy were found attractive. In this period the network type processes belonging to the second type could be linked to forming of different professional organizations and the appearance of their functioning and system level. Among these important roles have organizations related to leadership and governance: the association of non state school maintainers, a school leader association related to a Dutch-Hungarian leader training programme development (IME, ceased after 15 years), and other principal's association based on education level or programmes, several of them became part of international networks (ESHA, EFEA), actively appeared in the national area of education policy (OKNT, KT membership, independent actions). Based on a 2001/02 empirical examination the most common way of school leader's outside activity is participation in professional organizations; this characterizes almost half of Hungarian principals. (Balázs, 2004).

104. From the middle of the 90s in public education emerged different forms of cooperation.⁷ ; oriented according to public administration borders or outside these borders. The most widely spread and most successful, the public education attendance sector in Borsod-Abaúj-Zemplén counties, in an underdeveloped region in the north-eastern part of the country, where a part of governance assignments were risen to settlement level – meanwhile becoming a national organization⁸ - school associations, which at the beginning formed in Szabolcs-Szatmár-Bereg county then in other parts of the country. (Lukács, 1999; Bognár, 2002; Kapornai-Bíró, 2003; Papik, 2006). School association represents an early and important example of regional network activity in Hungary. The educational government supported these initiatives as well. These efforts did not lead to big changes because of the often changes in support circumstances and the lack of willingness in cooperation between settlements, the historical root of that is partly the hierarchical settlement-network conception of the 70's and partly the distrust of the control of the regional (district or county) party section.

⁷ The LXV/1990 law already stated that every local government “can freely associate with other local governments”, and talked about the possible variations as well.

⁸ The MIASZÖSZ nationwide social organisation was established in May 2005 by 19 founding members. www.miaszosz.hu.

105. In the first type of cooperation can be included the formation of micro-regional partnerships that were based on economical and professional rationalization. Their forming sped up from 2004. The 168 micro regions were defined as statistical and development policy unity. Based on the definition of scope of duties attended in the partnership and the referring budget sources (law CVII/2004).⁹ The education policy supported the partnerships, meant important role for public education's mid-terms development strategy of micro regions, the improvement of cost efficiency and governance standard and local-territorial planning system's further development. In the instrument store of the education policy, the territorial governance increased with a new instrument the micro-regional planning. Micro-regional partnerships with multiple purpose receive distinct supports determined by the finances act: they get a supplementary normative of 15.000 HUF per commuting student, 45.000 HUF per student/child attending schools or nursery schools (grades 1-4) of institute supporting partnerships in 2005. In 2004 7.7 and in 2005 15.4 billion HUF were devoted to the matter of micro regions. In 2005, supports consisted of two parts: apart from 6.4 billion HUF for the encouragement for formation and modelling experiments, micro regions got 9 billion HUF as a normative operative support.

106. In 2005, regarding the activity targeted normative, in the multi purpose micro-regional partnerships, within the three public service (public education, public health and social supply), the part of public education was 40% (between regions this value is around 20-25%); within public education assignments, the ratio of normative support for pupil's travel was 68%, for professional service maintenance 24%, for pupils who attend member institutes of institute supporting associations 8%. (Balázs-Palotás, 2006).

107. Between forms of partnerships of settlement cooperation, we can find public education provider partnerships (it is characteristic, concerning governance assignments, the creation of principal's and professional teams of teachers, and the common solving of special assignments), a more tight cooperation (common school support), where the ownership rights have the government of the settlement, where the school or the partnership is (in 2003 this was characteristic for 15% of the cases). The financing is split between settlements according to number of pupils. (Imre, 2004). Associations related to education, before the law of micro regions, could only be found in case of local governments with less than 2000 persons (Imre, 2004). This lately was shifted towards greater settlement partnership's tendency of growing. In 2003 there were 379 partnership that supported 510 institutes, in 2006 448 that supported 561. The average increase is 18.2%, in case of settlements with more than 300 persons the increase in 3 years is 150% (Balázs-Palotás, 2006). The partnership cooperation of public education institutes, in the beginning period was nor excepted positively. In 2003 with cooperation the participants at five-mark scale, taking into consideration different points of view, appointed, an average, 3. (Imre, 2004) As a result of normative supports of the partnership with multi purpose, common school maintenance has spread in almost all Hungarian micro regions.

108. Micro-regional partnerships do not have real tradition in Hungary. The establishment of a successful partnership requires from the leaders (mainly school leader and local major) cooperative skills, real cooperation instead of "experience-exchange", during which the stress has to be put on the division of power recourses. Local communities do not have confidence in the partnership; leaders (because of their role played in the community) have an important part in propagating the cooperation. In small settlements the question of partnership is bounded with the question of what kind of role does the school play in the life of the local community.

109. EU's structural politics will have a positive influence on the perspective of partnerships, based on which the national development policy, of the second period of support of 2007-13 (the 2nd National Development Plan which is based on the National Strategic Reference Frame), expectably intends meaningful sources to the spread and deepening of micro-regional cooperation. In this

⁹ In a paradox way, because of constitutional solicitude, the approval of the law followed after 6 month, the decree about stimulating supports (65/2004. (Gov. Decree IV. 15.). About the conditions of support requirements, amount of yearly support, decisional system and the settling of accounts for year 2004.

programme a role is given to the spread of positive experiences (e.g. the increase of professional standards of leadership, increase to a higher standard the attendance). (Balázs-Palotás, 2006:2.4)

110. The other type of network cooperation, the innovative network organization plays an important role in the life of the educational institutes and educational system. These network type cooperations are the scenes of professional and organizational learning in the way that can function as new forms of education governance and frames of efficient frames of innovation. (Halász-Palotás, 2003) About these types of innovative cooperations we will discuss more in subchapter 3.11.

111. We can also mention the networking due to international relationships of Hungarian schools. Hungary in 1996 joined the EU's educational programmes. In the first period mainly in higher education, vocational training and in research were broader cooperations which lately reached out to a wider circle of institutes. The obstacle of these cooperations was not the foreign language, but the restrained language competencies of profession teachers. Based on a 2001-02 empirical survey, amongst school leaders, only 45.2% of them have some kind of foreign language competency but much greater part of them participate in foreign experience exchanges and journeys. After the initial governmental encouragements, nowadays schools consider joining in the international network an own demand. Their sphere of operation has mainly expanded in case of thematic competitions (e.g. common curricula development, horizontal subjects), furthermore in case of looser forms of relationships (twin schools, collective camps, etc.).

3.9. The role of schools in the local community

112. Schools as community forming social institutes, in Hungary, play an important role on two times of settlement. One is the town where a grammar school can be the definer of the entire community's image – especially if it has historical roots. The other is the small settlement low (general) schools where the education plays a symbolic role in the life of the local society. Partly this is the reason why, on this segment of the inefficient public education system is so hard to validate the viewpoint of institute network's rationalisation. On the other hand the school is not able to improve the local society's cohesion, if material and human conditions, and pupil supply cannot show perspective for the local community - mainly for the schooled population, local intelligentsia.

113. The indirect ways of school's role in local community's life – also characteristic for smaller settlements – is that school leaders, some pedagogues are members of the local government (maybe the professional committee of the body). Hungarian public education, on local level, are directly guided by chosen by local representatives. (Halász, 1997) This is why, those pedagogues or school leaders who are members of the local representatives body have an important role.

114. In Hungary there is a school type that because of its organizational form is directly part of the local communities' life: this is the general cultural centres (GCC). These educational centres contain everything from kindergarten from secondary education. The number of these kind of schools are relatively low; generally in the Hungarian society the functional differentiation of public service is considerable, and because of this is sporadic the society forming effect. Another circumstance that impedes the direct connection with the local society is that the institute system of public education and adult training are working in two different structures, which is not favourable for the conception of life-long learning.

115. Schools there and then are parts of local communities, if they have a pedagogical programme that through its content and/or methods gives importance to this relationship. Programmes like these have equal school networks and others that have those kinds of programmes that are linked somehow to the local community.

3.10. Development of leader competencies

116. Although the governmental decree that regulates the public education leader training in details describes the requirements of qualification, did not happen yet a policy initiation for directed leader competencies development. There is no study or survey so far that would determine the competencies belonging to a successful leadership job, thus the training programmes of leaders and the advancement in the training cannot be assessed. In several bigger cities that put a stress upon institute assessment appeared that the “local policy” is oriented (also) toward leaders, tries to measure competencies and results but we cannot talk about overall steps in this matter.

117. In higher education teacher training programmes the development of leadership competencies are not everywhere targets. Organizations that offer leader-training programmes have put together their programmes based on foreign models, so the development of competencies “recognized as useful” is realised through transfer of knowledge. Leader-training programmes are presented in detail in chapter 6.

3.11. Innovative approaches of school leadership

118. On the side of education policy, leader development – and the whole system development through the leaders – is an underrated area because in the public education development strategy of the Ministry of Education and in the first National Development Plan, the leader development appears as a separate issue. In the last few years the national innovative programme, which defines the participant schools’ inner functioning and leadership, was the quality development.

119. The cancellation of the educational governmental policy of the quality assurance from the end of the 90’s (the COMENIUS programme), and the repeal of the quality development later (Local Quality Management Programme and the Institutional Quality Management Programme) were advantageous for the organizational and process innovation in some of the schools (more details in chapter 4). However, in other part of schools it remained mainly within bureaucratic frameworks.

120. Related to the effect of the quality management there was not prepared a survey yet, but according to expert’s examination can be said that a lot of institutes kept the partner centred quality, the follow-up of partner ‘s necessities and satisfactions and a lot of innovative solutions emerged. There are forms of work, procedures, techniques (e.g. team work, SWOT) that became common by today. Quality issue techniques in certain cases “filter through” into the education organization.

121. In Hungary, in the function and spread of professional innovation there is less characteristic the policy level governance and influence, the bottom-up processes have defining role. There are situations, where from the top and from the bottom initiated cooperations are complementary and in long term they strengthen each other. The bottom-up organized school association for example where, the main point of view of the development was the improvement of the quality of education through cooperation, do not follow the official boundaries of micro regions, at the same time they received state support in certain periods. Becoming an association makes possible to widen their jurisdiction: in their professional activity as an innovation channel of the education branch, as representatives of the civil sector can be the actors of regional development and cooperation.

122. The bottom-up and top-down development cannot be separated in the activity of the association of self-developing schools, but the strengths of the network is given by the first. Today this association has 126 very active and innovative schools; it was developed from a programme of Soros foundation’s activity in Hungary in the 90s. The programme was linked to the “official” education policy in the fact that was establishes to support local (school) level development of curricula as stated in the National Core Curriculum. In the frame of the public education development programme a great number of general and secondary schools took part in a training and development that was more

efficient and longer than “usual” (www.onfejlesztoiszolak.hu). “The programme tried to cover the pedagogical programme maker competencies wide and complex circle and within this an important stress was put to strategic management, curricula planning and adapting competencies development.” (Balázs, 1999) A particularity of the programme was that from each school three-person teams participated thus recognizing that the preparation of the pedagogical programme is not the task of one person (the leader), but the whole teaching staff. Moreover, they gave advantage to those teams that included school maintainers or “school users”.

123. As a result of the programme 92, schools’ pedagogical programmes were prepared, developed the regional centres that took part in the local level programme development, that were meant to pass over the experiences of the participants to other institutes of the region. As a result, it was possible for those institutes that did not take part in the training to access the experience database; thus, the programme was not finishes as a closed project but a real networking emerged. (Balázs, 1999) This process was further strengthened by the development of Association of Self-Developing Schools, to what at present 126 institutes belongs, and became the representative organization of 43.000 pupils and 5.000 teachers. In 2006 when the Association of Self-Developing Schools was 10 years old, the relation system is beyond of the boundaries of the country, mainly with areas where Hungarians live. In their activity beside the development of organizational leading, remained powerful the leading of professional development; this is served by regularly in-service trainings (in 2005 they have already accredited their own training), yearly they organize two conferences. In their activity, a major part plays the electronic communication; it is worth mentioning that the importance of this and the first steps of acquirement of the culture were included in the Soros founded programme.

124. A centrally initiated internationally upheld development projects network widens the circle of professional innovative cooperation. One of these programmes was realised by the support of Dutch and Hungarian ministries, the so-called prevention–accommodation–care, MAG, which aim is to develop general schools the location of efficient learning for all children, with a special attention to disadvantaged pupils. The programme started in the 2003/2004 school year and lasts for three years. The particularity of the MAG programme is that greatly involves in the learning development process the representatives of institutional and maintainer education governance: the common interest between pedagogue – school leader. School leader – maintainer is raised by the in-service training system of the programme. This particularity means the great importance of learning of the children in the line of professional developments and the education management. “According to MAG philosophy, not the student but the school changes: instead of helping the accommodation of pupils, they change the schools environment to help pupils have success. This not only means the possibility of development, but there is a huge challenge as well: requires a new way of thinking about the schools as a whole, about the organization of teaching and learning, and is a concrete proven and tested technology about the appliance of adapted learning organization.” (Halász, 2004) The development of the professional network based on the project aims for a wider spread of the methodology and results.

125. The development of Hungarian eco schools was due to national education development, international tendencies, within this to already existing networks. The perception of sustainable development and eco – awareness emerged after the change of regime; a part from the national civil sector it developed in harmony. In the development of the national network, the cooperation within the OECD ENSI has an important role. The eco school network, functioning since 2002 and has approx. 150 institutes, was supported in certain years by central support what was accessible trough competition. The network is characterized by strong local relationships, bound with the community’s life and beyond physical boundaries’ relations. Their web page (www.okoiskola.hu), regional conferences, system of further development and the eco-school award represents the dimensions of their activity quality. The eco-school title does not represent material advantage for schools, but they have to fulfil severe requirements, for what school leaders are responsible.

126. Regarding innovations has to be said that, in the past 20 years’ happenings in Hungary required significant institutional compliance from schools, concerning economy and professional leadership as well. From the part of education policy, school leaders receive very little support, to

bring to affect this compliance process, and this happened with numerous problems and mistakes, there can be found many good examples for successful innovations. The intense decentralization assures a wide jurisdiction for school leadership, in the same time the limited sources, lack of performance oriented stimuli, guides the energies of many leaders instead of innovations towards the uphold of everyday matters' smooth running.

CHAPTER 4 - ENHANCING LEARNING AND SCHOOL LEADERSHIP

4.1. Public policy problems regarding teaching, learning and the evaluation of these

4.1.1. Main problems concerning the quality of education

127. The importance of education quality and the evaluation of it were already clear for experts in the 1970s Hungary (Báthory, 2003). We participate in the IEA's work from the beginning and lately the 2000 PIRLS and 2003 TIMSS examinations were conducted in our country. In the one and a half decade following the regime change, but mainly in the past 5-6 years, became obvious for the education policy, the importance of quality and performance of education. The fact, that the quality and the effectiveness of education are bound up with the educational leadership, appears in debates of the education policy, at conferences and in various projects either. (Halász–Lannert, 2003, 2000, 1997)¹⁰ The Comenius 2000 Quality Improvement Programme for Public Education, based on voluntary attendance – profiting the significant decentralization of the Hungarian educational system – is meant to develop the local, institutional inner self assessing process. Beside the IEA survey, Hungary joined the OECD PISA examination, that was complemented by the government with a similar verbal and numerical reasoning ability measurement - a full scale assessment that measures, 4th, 6th, 8th and 10th grades - and with the National Competence Assessment, which, according to the law, has to be kept every year. (About the assessment mechanisms see item 4.3).

128. There are two important edifications of the national surveys. In one hand, the quality of Hungarian public education is not as distinguished as we thought one or two decades ago, although – considering the whole system's average student's quality – there are no reasons to worry. According to PISA surveys, Hungarian students perform just below the international average in verbal and numerical reasoning; while in IEA surveys, Hungary was regularly above the international average. The differences probably are due to means of measurements, different target groups (different age groups were examined) and different countries.

129. Another, more primordial message is that the dispersal of performance, that call attention to the selection between institutes, is very high regarding the international context. Among secondary education institutes, vocational schools and within these, professional schools' students have less verbal and numerical reasoning aptitudes than their colleagues from grammar schools. Such a selection in general schools can not be noticed, and we cannot talk about a school composition that would reflect social heterogeneity. Paying attention to the latter problem – especially when analyzing secondary institutes – is necessary: the challenges for school management are different when having students with a better family background than with a bad one.

130. The question's education policy importance is also reflected by the change of the quality concept. By the middle of the past decade, became clear that the quality of education cannot be regarded only from one point of view; there can be enumerated at least three different approaches. The first – and because the decentralized and competition based system maybe the most important – is the consumer's satisfaction, to be in consonance with parents' requirements. Although central information flow regarding schools' quality is not yet wide spread, local educational programme of schools, institutional and functional regulations, other documents that describe the functioning conditions have to be available for everybody, thus helping the choice of school and the development of the "school market". The second aspect of quality is schools try reaching their own aims, goals – this can be best followed in schools; in the local educational programme. The third interpretation of education quality is the concordance with the central standards. National Competence Assessments and the two-level

¹⁰ Some examples for the conferences: in Szeged - a city on the southern part Hungary - the annual Quality Assurance of Public Education Conference, public education conferences held in Lillafüred, in the east of Hungary, leadership developmental conferences of ten-year past or the annual conference organized by the National Institute for Public Education.

uniform secondary school-leaving examination introduced in 2005 can be reported to this quality interpretation.

131. It is important to emphasize that the central education policy left the possibility of quality problem evaluation and the necessity for changes because of this in the jurisdiction of schools management. Both the Comenius 2000 Quality Improvement Programme for Public Education and National Competence Assessments, but others – e.g. executed by experts – quality analysis as well are only possibilities in front of school managements and maintainers, to assess their school's successfulness; there are no central sanctions or awards, benefits.¹¹ According to a survey from 2005, 47% of secondary schools and 58% of general schools use the results of central evaluations during school work (Sinka 2006). Examples, that maintainers (beside the economical data) use the results of professional evaluation in the management of institutes, only exist in major cities (where – as presented in Chapter 3 – there is capacity to attend the education department)

132. A separate question is the quality of teacher training. On the Hungarian public education quality, the low standard of teacher training has a great impact. The regime change of 1990 was followed by a great expansion of higher education and the wider possibilities of work force market led to depreciation of teaching career. Teacher training colleges belonging to higher education are part of – within national circumstances – less popular departments; the teaching career is attractive only for an insignificant part of the society. (Halász–Lannert, 2003:293) Usually, those students apply here, who were not accepted elsewhere, but still, they are willing to obtain a diploma of any kind. Similarly, there are also problems with the quality of teacher training (Csapó, 2006); students learn obsolete teaching education techniques, thus increasing the differences already noticeable, when applying for entrance examination. There is a different problem that is no information flow between higher education and public education, although teacher training was always the duty of higher education and the effects condensed in public education. Besides all enumerated the salaries of teachers – in spite of 2002s wage increase – did not reach the upper level in the competition sphere, especially in case of well trained, experienced men, although young woman teachers can be regarded as competitive. (Varga, 2005)

4.1.2. The role of school leadership in the development and evaluation of education

133. The role of school leadership in the development and evaluation of education can be examined in two different ways. One is the extent of the role of school management, principals, and different organizations representing schools in forming the education policy. The other is – partly because of the first – in what extent does school management – as key actor of education development – is the theme of education policy.

134. The influence of school management, school leaders on central policy is fairly small. Although there are several organization that concentrate school leaders (e.g. Association of School Principals, National Association of Grammar Schools, National Association of General Schools Principals, Hungarian Society of Professional Developers) and the number of organizations of representation of interests exceeds one hundred, through these organisations their arguments can appear in front of the National Public Education Commission, that belongs to the Ministry; in all they do not have great influence of the already developed public policy. This is partly due to the fact that at present, the civil society in Hungary is still at the beginnings: there are not developed those institutional channels through which civil organisations could influence directly the decision makers. In professional representation of education policy, there are only a few practicing school leaders, their

¹¹ However, the latest modification of the Public Education Law connected new devices to the National competence assessment. According to this „, if the pedagogical function, according to the results of the national assessment and evaluation, of the given school doesn't comply with the minimum determined by the legislation” (Public Education Law, paragraph 99.§ (4)) on a long view,, there are unambiguous consequences in the law in regards of the school.

opinion can appear only in an “audition type” communication, and these opinions do not oblige education policy decision makers to anything.

135. A major part of school principals – approximately 30% - take part actively in national level events and conferences; because of the functioning of the system, their most important task is not to influence policy makers, but to assure their own school’s quality and success. One important aspect of quality is that schools would find their place in the competition; a successful principal is the one who can assure the survival of the school, fact that can be more easily executed not by influencing public policy, but the local measures.

136. In local policy, the importance of school principals is greater. In smaller settlements, on regular basis, former or present school principals have an active public policy role (e.g. in local governmental bodies), but in local governments that have school maintenance tasks an important role have school managements. About the school leader and local government relationship find more in Subchapter 3.4.

137. The conception of education policy about the role of school management represents the other important element of the question. For the proper functioning of the decentralized system it is very important the role of school management; schools without efficient management are not able to “stay alive” in a competition-based education model. The school management layer is important in every initiative concerning (central or local) education development. Because of all these, the theme of school management has to have importance in central education policy. Many times it is said as a weakness of education policy, that school management creates the possibility for schools, but do not force them to change.

138. Education policy initiatives arising as such possibilities are, for example, leader training and state support for leadership development (e.g. Public Education Leadership Development Institute or Soros Foundation’s leadership development programme supported by the state at the end of the 1990s). Before fulfilling the position, school principals were not obliged to take part in the leadership development programmes, but, according to a decree from 2003, for the second cycle the successful passing of the professional exam will be compulsory. Also, such possibility was the yearly attendance of leadership development conferences, supported by the state. From the thematic of the conferences, it is clearly visible that in the past years a great stress was put upon the role of school management in the improvement of school’s performance and quality. For example, the 2003 conference (School leading and modern learning environment) basic idea was that “without the conscious action of school management there is not possible the methodological renewal of teaching and learning”; the 2004 thematic dealt directly with the performance of school and school management (School management and public education evaluation).

139. The role of school management in the development policy can be also seen in national level documents. The mid-term public education development strategy underlined the improvement of the education’s direction. The development of institute level management, the promotion of institutional and local level management cooperation is also mentioned in the strategy, stressing out, that is important the determination of school management’s tasks and competencies necessary for school leading, the preparation of leaders, the sustainment of their development and making public the professional knowledge.

4.2. School evaluation and learning: institutional forms of school evaluation

140. The performance of the school can be evaluated in two dimensions: first is the balance of administration, sustainability of employment and – at more and more frequent situations – the bare survival of the school. The second is the professional performance of the school’s education programme. The fact that which of the two dimensions are emphasized more in one school, depends

on the possible consequences. Practically, there are no consequences in case of professional performance: most of the schools maintained by local governments, do not evaluate pedagogues' work from the point of view of professionalism (such an evaluation was effectuated by 38% of local governments – Halász-Lannert, 2003), but where this evaluation is effectuated, they do not sanction the malperforming school leaders.

141. The administrative-financial dimension has a greater attention, the difficulties of school maintenance force local governments to rationalize the capacities. In the rationalizing decisions. The weight of professional elements is low, closing and merging decisions are made based on economical indicators – but local policy lobbying greatly influences the process. The measurement concerning education quality, the appearance of responsibilities to improve this, plays a smaller role in the evaluation of school performance. The main target for quality indicators, that are also good for comparing institutes, are maintainers (local governments), secondly, would be schools that would use data for self-development but the lack of interest stops the wide spread use of this.

142. The deficit of the accountability in connection with professional evaluation stimulates school leaders to determine schools success, through survival and financial security. In order to do this, successful school principals use a major part of their working time to obtain the necessary resources: they apply, discuss, travel, network – a major part of their time is spent outside the school's walls. The accepted leading role becomes an outside-oriented management role, thus having less time to actually lead, stay in contact with school staff, development of the institute and institutional members – in one word, the leader role. They consciously rely more and more on assistant-principals in leading the school as an institute, managing the inner functions, leader roles regarding teachers and work division alongside management and leader roles. The changes – according to expert János Setényi– are reflected in the increasing number of assistant-principals: in the 1970s there used to be one assistant-principally an institute, today there are two, and in elite grammar schools – where tasks but resources also are more– even 3 or 4.

143. School evaluation, the question of calling to account start to be a daily issue in public policy creation, sign of the recognition, the improvement of calling to account can be one of the basic criteria of school system development. Hungarian school evaluation – in spite of the fact that the present, not final state, in not as a uniform system, but developed by elements has been created – is worth the attention as diversity and possibilities assured by the system.

144. Potential tools of Hungarian school evaluation:

Country-level tools

- **Accreditation.** The accreditation of course books, experts, examiners, frame-curricula, and the subjects of secondary school-leaving examination belongs to National Public Education Evaluation and Examination Centre (OKÉV). The National Public Education Evaluation and Examination Centre as a central institute functioning in seven regions attends its activities. National Public Education Evaluation and Examination Centre is entitled to permit the excess of the maximum allowed group and class number, to issue the certificates for students, pedagogues and teachers from abroad, to the National Public Education Evaluation and Examination Centre have to institute actions against secondary school-leaving examination committees, appeals against decisions of vocational institutes; and beside all enumerated, is among the National Public Education Evaluation and Examination Centre's duties to control all above mentioned. The National Public Education Evaluation and Examination Centre, established in 1999, makes possible for the state to actively interfere on the mentioned fields.
- **Secondary school-leaving examination.** Started in 2005, the central secondary school-leaving examination became a tool of comparison between schools. After several years of preparation, there is a standardized (institute comparison), two-level (high and secondary level), instead of lexical knowledge puts a stress a usable knowledge, replaced the examination procedure functioning as an inner examination. Another advantage of the new

system is that merged the functions of entrance examination and the secondary school-leaving examination, in other words, the written part of the secondary school-leaving examination also functions as the written part of the entrance examination, regardless of the institute students have applied and whether they applied or not. Thus becomes more transparent, just because everybody writes the same secondary school-leaving examination and entrance examination. The most important deficiency of the secondary school-leaving examination is that does not assure the every year comparison and is not suitable to school work accountability.

- **National Competence Assessment.** Started in 2001, the aim of the National competence assessment is to assure the objective measuring devices suitable for learning development in the schools, and the comparison of institutes on the level of the system. So far, the survey was held in 2003, 2004, and 2006 and probably, will be held every year from now on. In its logic, resembles the international PISA surveys: has as aim not the learnt knowledge but the usable competencies, verbal and numerical reasoning. The result of a class is centralized according to school and grade and the results, the evaluation guide and the mean of an other group's results from a similar school are sent back to the specific school. The National Competence Assessment relies on standard tests and thus is suitable to assist comparison between different school types. Besides, the students' test also evaluates their family background what can be a great tool for revealing the quality of the work different schools have done. At present, only the school maintainers and educational institutes get the results of the measurements, therefore their application also depends on the maintainer, or on the given school and on the principal (whether to process all tests, asses the performance differences of students studying on similar levels, relate them with the teacher or not etc.). The data of the measurements will be public from 2007. While, according to the 2006 modification of the Act on Public Education, schools have to prepare an arrangement plan when their measurement results don't comply with the minimum determined by the legislation.¹²
- **Secondary school orders.** Opposed to the results of the National competence assessment, secondary school orders based on the successful entrance examination ratio – despite their boundaries – are public for decades, thus assuring the annual comparison of schools on the fields they observe (e.g. the effectiveness of the entrance applications, the rates of the language exams, etc.).
- **Other.** Other, indirect tools of school evaluation can be the so-called best practices that are suitable for the schools to get acquainted with the well-tried methods applied elsewhere ,and, on the basis of this, to initiate changes.

Local external tools for evaluation

- **Municipal Quality Management Programme (ÖMIP).** “The local quality management programme determines the maintainer's expectations, the duties of the institutes in connection with the maintainer's expectations, the relationships of the public educational system and the other fields in connection with public education, the order of the professional, legal, financial control planned within the framework of the maintainer's control.” (Public Education Law, paragraph 85 § (7)) Besides these matters, the maintainer has to check the economy, the legality of operation, the effectiveness and the successfulness of the professional work of the public educational institute at least once in four years. The Local Quality Management Programme and the Institutional Quality Management Programme (see below) make up the backbone of the quality evaluation mechanism of the decentralised educational system. The other elements enlisted, if they function well, complete it.
- **The publicity of school documents.** Schools' and maintainers' task is to comply with curricula standards in the law (see next Subchapter). Documents prescribed for the school are: the institutional quality management programme, the local education programme of school,

¹² This minimum level is still not determined at present. However, it is obvious that the school has to take steps in order to improve its effectiveness within the framework of a multiple-staged mechanism, in an outer, given case under the control of the authorities.

the organizational and functional regulations, the local curricula, the inner rules and other documents have to be available for all interested, thus assuring the consumers' interests, the most complete serving of the aspects of quality.

- **Experts.** Experts, accredited by the National Public Education Evaluation and Examination Centre can evaluate institutes, materials, local education programmes of schools. Consultants are mainly private entrepreneurs, but in many cases schools can use their services for free. Consultants may work in a school during a special task or help the institute within the frame of a permanent assignment: in the last few years became usual the one task assignment. The main deficiency of the system is the low level of standardization (accreditation only is not enough to assure the uniform standard) and financial difficulties (the institutes that really need consultants cannot raise money for the fee). The accredited consultant system is a sort of „privatized school inspectorate”.

School-level tool for evaluation

- **Institutional Quality Management Programme (IMIP).** This programme defines the long-run principles of the institute development, furthermore the concepts of the accomplishment. The process of the institute operation, the fulfilment of the managerial, planning controlling, measuring, evaluating duties, the aspects of the performance evaluation of the people performing managerial duties, furthermore of those, who are employed pedagogues and the order of evaluation should be determined here. The period, the methods and the relationship with the maintainer quality management system of the all-comprehensive institutional self-evaluation should be stated in the programme. “During the fulfilment of the quality management programme, the results of the national assessment and evaluation should be considered. By asking for the opinion of the parental community (organization), the educational bodies annually evaluate the fulfilment of the institutional quality management programme, the results of the national assessment and evaluation, while considering the students' individual development and the performance of the classes. On the basis of the evaluation, those arrangements should be determined, which assure that the professional aims of the institute for public education and the operation of the institute are continuously coming closer to each other. The evaluation of the educational bodies and the parental community (organization), furthermore the recommended arrangements should be sent to the maintainer. The recommended arrangements come in force by the maintainer's approval. The maintainers have to make the evaluations and the recommended arrangements public on their homepage, or traditionally, in case of the absence of homepage.” (Public Education Law, paragraph 40 § (11))

145. Generally, the system can be considered being very wide spread, on and all it is equivalent with a coherent decentralized system, based on institutional/maintainer independence, centrally supported and supervised evaluation system in Hungary. There are central programmes, callings for tenders connected to the quality developmental devices on a regional and institutional level. Such as the COMENIUS 2000 programme or some of the components of the Vocational School Development Programme. In 1999, the Ministry of Education formed a development programme for the fulfilment of quality development goals, which is called *Comenius 2000 Quality Improvement Programme for Public Education*. The aim of the quality development was to guarantee that educational-training institutes offer a service, which corresponds to the local society's expectations. The COMENIUS 2000 on both institutional and maintainer level contains 3 models: the first is ”partner centred activity”, the second is TQM (total quality management), this is an institutional development of an overall and continuous quality assurance system. The local (institutional) development of quality assurance system was stimulated by the Ministry of Education with an important amount, based on call for tender system. On the first round (spring 2000) 1400 institutes submitted their competitions to realized COMENIUS 2000's first and second model. In one part of the institutes, the applicants of the model resulted in a spectacular institutional development but the detailed process regulation in many cases

remained formal or strengthened the organizations bureaucratic character. The above discussed Local Quality Management Programme and the Institutional Quality Management Programme can be considered as the expansion of the quality developmental ambitions of the central government, the elaboration of which are compulsory according to the 2003 modification of the public education (Radácsi, 2004).

146. The main deficiency of the developing school evaluating system is its weak developmental orientation. This could be assured by regular qualitative institutional observations and by making the results public. For what is concerning the point of view of learning development a problem represents the fact that the above mentioned tools aim the development of teacher's evaluation culture, but cannot reach it. The evaluation of the pedagogues is not part of the Hungarian quality management. While the introduction of measures' aims is suitable, the system lacks the tools of accountability of execution, professional and financial support.

147. The monitoring of school evaluation system is also very new. About the use of central standardized systems - secondary school-leaving examination, National Competence Assessment – we know very little. In 2005, in the National Institute for Public Education Research Centre the results of OKM were analyzed in 1000 selected schools according to empirical enquiry, based on a discussion with the school leader. The surveys were analyzed orally in two thirds of the participating schools (during school board meetings) and in writing in the case of 28% of the schools. Based on primary results, can be said that only a very small percent (7-8%) of schools do not support competency assessments, but its use – the development of schools based on assessed results – it is not widely spread. Central professional support assures such software with help of what certain schools can analyze themselves the results of competency assessments, but this analysis is very rare (Sinka, 2006).

148. Good examples and some fresh empirical results let us think that competency assessments, in the future, can help to develop the mechanisms of school evaluation. This, of course, greatly depends on school principal and the institute's inner impulse. This importance is signalled by Self-Developing Schools, where participants accepted (organizational) development as strategic function thus the feedback effect of performance evaluation can succeed. According to experts' opinions 10% of schools are innovative, pioneering institutes, one third is self-reflective, meaning that asks questions regarding its functioning and, if necessary, takes steps as well – these are the schools that can live well with the possibilities offered by the Hungarian system.

4.3. The specification of the content of teaching and the school curricula

149. As already mentioned in Chapter 3, Hungarian schools have a great independence in forming their inner functioning frame. Although school curricula and the regulations concerning education programmes have changed in the last 10 years, the content determination of education is in the hands of certain schools, since National Core Curriculum was published in 1995. The national legislation sets only the frame (the tightness of the frame are different in the analyzed period) the content becomes the responsibility of schools and leaders. Of course, for the development of local education programmes, a lot of actors offer their help and useful model, thus the process of local adaptation becomes less complicated, regarding a wide and complex development.

150. The institutional level of professional and pedagogical functioning is set by the pedagogical programme that is the tool of strategic planning and it formulates the aims and principles according to the environmental conditions of the educational institute and participators' expectations, furthermore the main functions. The National Core Curriculum and the local curricula based on the frame-curricula (the school either develops the local curricula according to the aims of the pedagogical programme or it chooses one of the local curricula prepared elsewhere as such, and includes that in the local educational programme of school) belong to this programme. The local curricula should contain the subjects and the number of lessons belonging to them, the entirety of the applicable course books and school equipments, furthermore the procedure of the evaluation of students' performance. The institute

leaders are responsible for the preparation of the pedagogical programme and the local curricula, but characteristically, they strongly rely on the educational bodies during the fulfilment. The programme should be accepted by the educational body, and these documents come in force after the maintainer's agreement (the maintainer before agreeing on, has to ask for one opinion statement from an expert included in the National Expert Register). The finished documents should be made public on the homepage of the institute, or traditionally, in case of the absence of homepage. Based on these documents, the annual operative work plan is prepared and it determines the tasks for one year. This document is prepared by the principal while consulting with the broader school leadership (and while, in some cases, delegating one part of the duties); and the education body has to approve it as well.

151. This planning process used to be delayed in a great extent by the multiple modifications of the regulation of the curricula in the last decade. The reform of the curricula began with the introduction of the *National Core Curriculum* (NAT). The National Core Curriculum formulated wide frameworks for the operation of schools, its most important characteristics can be summarized in the followings:

- The determination of requirements for the whole period of compulsory schooling regardless of school type
- The curricula content is arranged not in materials but in general cultural areas, giving thus the opportunity for schools to develop their own integrated subjects.
- Accepted into the requirements such educational areas that before were not part of curricula in Hungary (e.g. human knowledge, informatics, dance and drama) and also determined subject domains as well (e.g. communication, public health education and environmental education).
- Requirements were drafted not by classes but by sections (general requirements according to two main pedagogical sections at the end of 6th and 10th classes, detailed requirements by the end of 4th, 6th, 8th and 10th classes).
- Uses only 50-70% of the time frame, leaving a wide area for institutes to implement additional subjects. (Halász-Lannert, 2003:180)
- The numbers of lessons are drafted within wide frame, leaving a broad area for institutes to make their own schedule.

152. According to the National Core Curriculum, schools had to prepare their local curricula from the bottom up. The implementation of the National Core Curriculum was a serious and modern duty, since it presupposed great independence of the schools and school leadership. (Halász-Lannert, 2000). During the course of the preparation, the in-service training system gained a key role: beside the courses concentrating on a certain educational area, courses dealing with curricula preparation were also popular. The prepared National Core Curriculum compatible model plans were shared by a computer database and an off-line institute network. With ministry and foundational support 19 institutes' entire model plan were accessible and manual publishers prepared curricula to popularize their printings. The curricula supply was diverse but there was no evaluation mechanism based on which the quality of the already prepared curricula could have been uniformly evaluated.

153. "The introduction of National Core Curriculum was followed by professional and political disputes. A Gallup poll among pedagogues showed that 60% of teachers accepted the National Core Curriculum". The supporters of the National Core Curriculum were, first of all, the innovative schools (approximately 15% of general schools); the judgments aimed mostly the implementation procedures. Against National Core Curriculum were those grammar schools that prepared for preparation for entrance examinations: the National Core Curriculum did not refer to secondary school-leaving examination and entrance examination requirements.

154. The introduction of the National Core Curriculum represented a good opportunity for open institutes to rethink their functioning; can be observed that institutes that developed innovative programmes were active participants of quality development programme in the second half of the 1990s - leader's commitment had a determining role.

155. Following a governmental change in 1998, a new tool was introduced in 1999, the *frame-curricula*, that, although based on the National Core Curriculum, restrained more severely the development of curricula. The main characteristics of frame-curricula are:

- Determines, based on school types, different training aims
- Instead of wide educational areas, determines concrete subjects.
- There are notably less freely planned lessons (at low classes, minimum). (Halász-Lannert, 2003:181)

156. The previously prepared local curricula have to be adjusted within 2 years in order to comply with the new requirements. There were centrally accredited frame-curricula prepared for the different types of schools, besides, the pioneer institutes had the right to have their own curricula accredited. This latter matter was introduced in order that institutes with a lot of energy effectuate adaptations can function undisturbed.

157. “For school leaders and pedagogues the preparation of local education programmes represented a less effort than before: in 1998, 78% of the work for the first document was enough for this work.” (Halász-Lannert, 2003:185) The task of the leadership, besides organizing, was that shortly after the previous material development cycle, could motivate again the pedagogues for further work. According to one representative national survey from 2001/2002, (local curricula analysis), only 6.7% prepared curricula of their own, 40% simply borrowed without changes somebody else’s.

158. In general, the reception of frame-curricula was positive in the pedagogical society. “To this, significantly contributed the return to the habitual subject system. [...] with the fact, that central leading assumed the distribution at national level the numbers of classes, preceded the conflicts when distributing subjects in educational bodies, such as during National Core Curriculum’s implementation.” (Halász-Lannert, 2003:185)

159. “According to a survey effectuated within schools, in 2001, the modifications of local education programmes of schools, a determining role had school principals. [...] It seems from the data that leadership not only led, but almost accomplished the major part of the work for changing local education programmes of schools, which are not different from what was experienced when preparing documents for the first time.” (Halász-Lannert, 2003:72)

160. After another a governmental change, the Educational Government initiated the *revision of the National Core Curriculum* as the highest level of content regulation in 2003. Following the revision, this document preserved its strategic- and basic curriculum-character, furthermore its developmental function even strengthened. The National Core Curriculum determines those interdisciplinary fields and competencies that should be enforced in every cultural field. By the change of the previously detailed requirement system, the National Core Curriculum became competence-based. This document emphasizes, amongst others, the communicational, the decision, the essence-stressing, the cooperative and critical abilities. The new National Core Curriculum contains the content division of the public education (grades 1-4, 5-6, 7-8, 9-12), determines the contents and competences to be acquired in different developmental phases and the developmental duties current in different content phases. Additionally, the National Core Curriculum formulates recommendations in connection with the division of the time of the curricula, that are defined to allow schools to use 10% of the time of the curricula freely. The revised National Core Curriculum became introduced from 1st September 2004, from the bottom up in year one (governmental decree no. 243/2003. (XII.17) about the issue, the introduction and the application of the National Core Curriculum).

161. The new National Core Curriculum doesn’t regulate the direct school practice, it – amongst others – orientates the elaboration of *frame-curricula*, which is on the second level of the content regulation. While by the time of the introduction of frame-curricula there was only one frame-curriculum coherently adjusting to the new National Core Curriculum, more accredited frame-curricula are prepared according to school-types, all of them offering alternative curricula

comprehensive all cultural fields (decree of the Ministry of Education and Culture no. 17/2004 (V.20) about the order of the issue and the approval of the frame-curricula). The duty of the frame-curricula is to operationalize the developmental tasks of the National Core Curriculum for the educational body, for the authors and the publishers of the course books and for the programmers who develop pedagogical programmes.

162. The new element on the second level of content regulation is the so-called *educational programme*, a programme package, and its function is to present all the devices appropriate for the fulfilment of the teaching-learning processes (the planning, the organization and the evaluation of the process). The development and the evaluation of the educational programme package are still on within the frame of the national development plan. In given competence fields (reading comprehension, mathematics, foreign language ICT, social, lifestyle, environmental and carrier development), the programme package algorithmizes the teachers' and students' ways of arranging the syllabus, organizing learning and developmental evaluation.

163. The local curricula being on the third level of the system also have to comply with the regulations of the National Core Curriculum. However, the school may take an accredited frame-curriculum if it is considered appropriate, or, with greater energy investment, it may create an own curriculum. Besides all of that, especially in case of schools offering school-leaving certificate, the requirements of the competence assessment of the (new) secondary school-leaving examination should be taken into consideration. "Both the secondary school-leaving examination and the national competence assessment operate as a strong content regulator while both – as an outcome evaluating element – react upon the local curricula and the teaching practice. (Vágó-Vass, 2006)

164. In the course of defining the content of teaching, the selection of the course books and other content media plays an important part. Theoretically, this should be performed in accordance with the aims of the pedagogical programme and the local curriculum, but teachers choose course books and the educational equipments. Choosing the content media traditionally constitutes an integral part of the pedagogues' professional anatomy. The course book market operates as a real market in Hungary, in other words the majority of the content-offering participants create content media on a profit-orientated base, and are interested in the dissemination on the widest circle possible. Only a few institutes are able to generate their own contents suitable for their own aims. (OPEK, 2003)

165. Although the changes sketched above were prepared to think over and develop their operation, educational and training methods, most of the developments aimed at the transformation of the content. Thereupon, the pedagogues were busy rather with the questions about the content so they could pay less attention to the development of their teaching methods – this misbalance should be remedied in the future.

166. While for the content of education the above regulations were born, the uniformization of exams not happened until the 2005 secondary school-leaving examination reform. Beside the significant free and decentralized setting up of professional school programmes, educational leading tries with more severe regulations to create comparison and stimulate quality functioning between institutes. The new secondary school-leaving examination – as written before – instead of lexical knowledge, emphasized the assessments of competencies. This serious change about outgoing requirements had, so far, no major effects on local education programmes of institutes. It is significant, that for the "secondary school-leaving examination project", that suits better the aims of learning development (during which the student presents a product created with a longer creative work), very few supplied.

<p>The leader, in helping learning development and forming the materials according to this, cannot be avoided. According to MAG programme coordinator, in Chapter 3, leadership support was successfully obtained in such innovative, new way of teaching initiatives, where parents were initiated in the teaching process or flexible bell ringing system. Where this support was missing, pedagogues within the programme lost their motivation. The minimal requirements with</p>

leadership support is that they let experiment pedagogues and “see themselves” what results can a programme achieve.

4.4. Human resources management

167. While measurement of the performance at schools (the output regulation) is getting more and more emphasized within the Hungarian educational system (since the measurement is “tough”, standardized and – in case of appropriate intention – it aims at easily communicable factors), the development of the institutional processes responsible for the achievements nowadays is not so toned yet. In Hungary, the institutes for public education are expected primarily to be operated by the quality management programmes these days. “The compulsory quality management” can be considered the well-substantiated predecessor of the Comenius 2000 programme that already acquainted the more innovative and more open schools with the method a few years before. Although a comprehensive analysis of the introduced quality management systems hasn’t been done yet (in this respect, we can lean on some case studies and on a research performed within the cities, Sinka 2005) according to the experiences, the quality of the complete programmes (and the extent of the efforts of the institutes made for the preparation) indicates great variety. (In the elaboration of the programmes huge amount of outside experts took part.) It is basically statable, that the sensitivity towards quality and operational development cannot be raised by the legal regulation of the existence of the programmes. We also need the expertise necessary for self-improvement to be available in the institutes, and the maintainer, who can really judge the performance of the school – and is obliged in Hungary to do so – to take this duty seriously.

168. So if we consider how the systems operating the resources should look like within the school and one of the most important one of them is the human resource management, then, regarding the developmental means of the recent past, first we think about the operation of the quality management systems in Hungary: for the development of the management inside the institute this was the only significant initiative that was also supported by the education policy. A reason why it would be important is that the experiences of the human resource management will be processed systematically in education either.

169. The primary question of the human resource management is the identity of the school leader. In Hungary, only pedagogues can be school leaders (and the necessity of this is comprehensively accepted within the participants). The Public Education Law LXXIX/1993, regulates the number of lessons of pedagogues – among which leaders. The regulation considers the character and size – e.g. in a small, few classes general school a few, in a big secondary school is less the obligatory of leaders to teach than common pedagogues. The basic legislative intention is that leaders – besides attending leaders’ duties – remain pedagogues. The law has a paragraph according to which, with the accord of maintainers, the number of obligatory lessons of leaders can be diminished, in theory it is possible for a school leader not to teach at all. There are not enough data in practice how evolves the number of classes taught by leaders, but experience shows that leaders spend less and less time with teaching. It wouldn’t be a problem at all, if this “free” time was devoted to the inner management of the organization, to “school leadership”, that could help them to take part in teaching in the same way – or rather more exhaustively; but this happens – as we have already mentioned before – only very rarely.

170. The leaders’ and the pedagogues’ personal evaluation should constitute the part of the school operation. (Public Education Law, paragraph 40 §) The public education law doesn’t formulate exact dispositions in connection with the matter, it only says that the aspects and the order of performance evaluation should be contained in the institutional quality management programme. Although, this kind of “systematic” evaluation is considered a new element in the Hungarian public education (and because of the short time passed since its introduction, we don’t have any experiences in connection with that), the control of the pedagogues’ work is not recent. The most common form of this is “class attendance”, an important role of the principal as “leader”, can only be realized based on the inner

regulation. Based on experience, class attendance and the linking mentoring and personal consultancy, it is not wide spread anymore in the schools' practice. The pedagogical career model draft published in 2001, had included that for starting teachers they would create the "mentor teacher" function, but this remained only a plan. For the inner process of teaching, staff development – except the compulsory further trainings – there are no formal descriptions, it depends entirely on the school.

171. The leader's influence upon the institute's processes of human resource management, in theory, is important because the school principal is the employer of all pedagogues and other school employees. There are a lot of schools, where really exist personnel policies. According to public employees wage regulation, the teachers' salary is composed from three components: 1. Minimum wage, according to the law of Public Employees; 2. Determined by legislation: supplements, completions for different function in school (e.g. form-master bonus); 3. According to personal performance and quality.

172. While institutes are bound to record the method of the performance evaluation, it is possible, in principle, to encase personal compensation into evaluation. This effort was also supported by the appearance of the quality bonus (salary supplement) that inspired most of the institutes to determine the assignation of the amount available. But on the other had, we can still state that the vast majority of schools are reluctant to bind the evaluation of pedagogical work and the earnings together. The realization of classification type evaluation would be problematic for two reasons. One is, in Chapter 3 already mentioned, conditions: because of the lack of material sources, the leader cannot – or only is a small matter can – differentiate in wages, according to performance, and the other possibilities of motivational elements (e.g. lack of career possibilities, attendance to personal further development) is not too wide. Institutes can only pay the supplements according to the law. Considering personal performance, could only differentiate the leader if would decrease the salaries of malperforming teachers – this conflict source is not accepted by any school leader. The other reason is the lack of school performance evaluation and the limited effect of this: until there is a forcing element from outside, pedagogue's worrying and distance keeping comes to surface. On a discussion from dealing with teacher evaluation, emerged that Hungarian teachers find necessary to create the developing type teacher evaluation. During the discussion, many shared their good practice; primordially from self-developing innovative schools (see Subchapter 3.11). (Golnhofer, 2005) So, in spite of the difficulties, there are several schools that take advantage of every three aspects of wage regulation.

In consequence of joining the innovative programmes, started these institutions to deal with organizational development, team-building, innovation management. The preparation of local education programmes, the continuous competition writing, and obligatory preparation of in-service training plans made felt the necessity of pedagogue's evaluation (Halász-Lannert, 2003). One of the best practices of personal performance evaluation we find in Illyés Gyula Grammar School from Budaörs. (Árendás, 2006). The performance evaluation system serves three aims:

- The evaluation of personal development and preparation of personal development plan (activity centred process regulator element);
- The wage based on objective – and easily evaluated school activities, e.g. class teaching, assisting, extra curricula activities and beside these, taking into consideration the results achieved in educational competitions – determination – result centred rewarding element;
- Facing the pedagogue with students' opinion (confronting formative element) from which everybody would know only his/her evaluation and the top list.

173. The institutional quality management is (or can be) a significant device because, within the institute, it widens the circle of the operation evaluators and of those, who feel responsibility for development. It makes use realize, that evaluation is not exclusively the leader's duty and authority, but it is the inducement of the personal and collective development. It is not an ignorable effect either, that it contributes the development and the confirmation of the middle-position level that is missing from the institutes presently – but which would be essential regarding distributed leadership. For the

successful fulfilment of performance evaluation, appropriate professional support should be assured (so training aims can be formulated even for the system of further education).

174. The presentation of the students' opinion is a problematic point within the evaluation: although, there are exceptions, the inclusion of students' opinion is not a common practice. (The most characteristic exception is the awarding of the price, "The teacher of the year", but by itself, it can be only a tiny element of an evaluation system.) Although, the processing of students' evaluation needs carefulness, this field should be more emphasized in the future.

175. An important field of teacher development is the further development system, which concerns 170.000 active pedagogues in Hungary. It is compulsory for everybody to attend to these in-service trainings: 120 lessons every 7 years. (About leader's in-service training see Chapter 6). There is no legislative prescription for the content of the schools and pedagogues. They choose themselves what kind of programmes they prefer. The market is entirely offering: everybody can offer in-service training programmes if accredited. At the end of 2001, 1905 programmes had permits, these can be found in the register of the Ministry of Education. Almost 60% of the programmes deal with teacher's training. In 2001/2002 approximately 68.000 teachers took part in some sort of in-service training programme. (Halász-Lannert, 2003)

176. The in-service training expectations have to be determined in the 5 years in-service training plan. In creating this plan some pedagogues and educational bodies have a great influence (the plan, according to the governmental decree no. 277/1997 is prepared by the school principal and acknowledged by the educational body) only the necessity of preparing the plan stimulates schools to systematically over think the training necessities.

177. While the financing of further education has changed, the resources to be spent decreased. The government or the maintainers can have an influence on participation in certain programmes if financially sustain the participation of institutes. In the future, an important aim is that teachers' development and their further education would not only "happen" just because it is compulsory, but because schools - including pedagogues – recognise its significance in order to increase performance. Although, the decrease of the normative may include this hidden message, the leaders' persuasion should be in the recognition of the importance of the question – without this factor schools perceive the change only as a simple (new) financial restriction.

4.5. Research results of effective school leadership

178. In Hungary the technical literature dealing with school leadership mainly analyzes the characteristics of both school leadership and school principals (Balázs, 2003). The number of those works that consider the relation between efficient school management that facilitates the studying of pupil's are minimal. Researchers haven't focused on this topic so far presumably, because there weren't any numerical information about school quality of appropriate quality and quantity available. Over and above researches specialized on quality were neither prepared based on data for school management analyses (e.g. PISA). However, this aspect of school management is gaining more and more attention; still, the strength to influence the policy of researches is meagre.

179. Researches confronting school management and performance of school reveal an important recognition in concordance with international literature. It is natural that the measurable, numerical and formal parameters – such as qualification, language proficiency, gender, etc. - of school management in conjunction with performance are very low because of methodological problems, especially when analyzing national data. This springs from that recognition that school principals influence pupils only indirectly, through their teachers. On the other hand, the educational system is so much segregated that only homogenous group of schools can be characterized, not the entire system. Qualities which can not be influenced by schools – type, maintainer, settlement... - appoint the types of capacities reachable by the school.

180. Above all, the extent of conjunction can be diminished by non methodical ascertainment that school principals think as teachers (Baráth, 2004). School principals themselves consider that the processes from the classrooms influence most the performance of pupils thus impute less importance to teachers' stimulus and to the role of work discipline.

181. Despite all these problems, inceptive empirical results regarding middle schools appoint to the fact that those school principals who have consistent goals, invest energy in their school work and are able to form some kind of inner coherence with the staff, manage more efficient schools, than the rest (Horn, 2006). This effect – in coherence with the theory – reports itself more vividly in schools without inner coherence; the better school management has a greater impact here. The characteristics of school management are able to account for at a low rate the performance measured with pupil indicator, the statistical effect is significant.

182. Beside the above, two works which directly examine the question of school management and performance; other works in Hungary examine the stress of contextual characteristics of school leadership upon performance. The most important result the already mentioned school selection's impact upon school quality (e.g. Kertesi-Kézdi, 2005), but there can be found analysis that tries to link the school's practice of assessment with the quality of the institute (Sinka, 2006).

183. Overall, it can be said that the number of works, that analyze the coherence between Hungarian school leadership and school quality is low. In the past years – in parallel to the attention upon education policy – the awareness of researchers is sliding toward this direction.

4.6. Education policy initiatives to improve efficiency in school leadership

184. As a benefit of the decentralized system, school principals have a major part in preservation of school quality. The central education policy, because of this, has the possibility to develop stimuli that help school leadership and schools in professional elucidation. Although policies meant to develop educational quality do not directly aim to improve school leadership; school principals – as central actors of school quality – for political initiatives meant to develop educational quality are inevitable. On the one hand, while from 2007 the results of the annual national assessments are public not only for the schools and the maintainers, but they will be available for everyone which may result in greater competition between schools and in greater accountability, but especially, while sanctions are promised in the law against those schools that don't comply with the minimum defined in the legislation. (Public Education Law, paragraph 99 § (7))

185. The newest and most effective policy of the quality policy is the introduction of the national competence assessment. For the school principals and for administrators is a chance to get feed-back from it, because every assessment is followed by a central estimation that analyses the school's results. This assessment can be regarded together with PISA international assay and the new two-level secondary school-leaving examination, as output stimulus/regulation.

186. The leader training programmes (e.g. Public Education Leader Training Centre, Soros Foundation etc.) try to improve the quality of education by improving the skills of school principals. Chapter 6 has detailed description about leader training programmes.

187. The improvement of school performance can have other, indirect tools as well, such as the already mentioned expert network, applying different projects, use of materials of different conferences and events, meeting other professionals, taking part in professional organization that can help to the spread of best practices.

CHAPTER 5 – THE ATTRACTIVENESS OF SCHOOL LEADERS' ROLE

188. In this chapter only the leader of the institute (in the terminology of law/decreed higher position functionary) will be analyzed, assistants, administrative directors are not included. This has a practical reason: numerous characteristics, trends, phenomenon (e.g. carriers, salaries) can more easily be analyzed for a concrete position.

189. Our remarks, analysis consider first the position of principals from state schools. In our essay, we also reflect on church schools and foundation schools as well, but we always draw attention if the remarks consider these types of schools.

5.1. The major focus points and problems regarding the role of school leader

190. The institutional autonomy declared by the education law in 1985, the triumvirate of decentralization-plurality-deregulation, the alternative curriculum started a process that joined the European tendencies so it can be analyzed together with these institutional processes. The law of 1985 radically changed the position of the school leader: it introduced the call for tender, the term of nomination was determined in five years, and the staff had the right to agree upon the person of the leader.

191. As result of the changes, grew the role of the educational level thus the jurisdiction of school principals, which led to a transformation of the principal's position. Beside the role of representative of the central power, the principal became a representative and a lobbyist of the staff and school community (the nomination from the staff's part grew the legitimacy of the principal as a lobbyist). Thus the school principal was part of the local/central leading circle and in the power field of the school community, this was regarded by many as insecurity, originated from unclarified question of responsibility and autonomy and lack of tools of command available to school principals. This may seem a legitimate standpoint for some concrete questions (some human resources questions), in general this open situation (or in another interpretation: uncertainty) makes possible dealing processes with school communities and local/central leading levels.

192. Nevertheless, nowadays, every debate about school leadership transforms into a debate about the schooling as a whole and is not the question of finding the powerful and efficient leader anymore. In this matter the present problems; dilemmas cannot be referred only to the leader's person and abilities. Instead, has to be applied a more spacious referral frame, in which the principal's position in school, school system has to be regarded as starting point.

193. On the whole, regarding school leadership, in the present the following issues, problems can be formulated:

- There is no real competition in spite of the inviting application system, due to the low number of applicants. On average 1.2-1.3 applicants are for one position which, most of the time, includes the present principal as well. The basis of choice is small and in general, the attractiveness of school leader position is very low.
- The questions of leader renewal: for the time being, there is no answer to the question what kind of professional progress is foreseen for those leaders who cannot renew themselves as school principals. Is it possible to preserve their leading experience?
- The possibility of local governments (maintainers) is limited by the income and size of the community. Smaller communities because shortness of expertise and competence lack real control and supervision of the maintainers.

- The call for application system – only in major cities’ government and in some church institutions – has the measurement for leadership competence and performance
- Although the law gives the possibility to supplement the salary based on performance, the maintainers seldom use this for capacitating the school leaders (see chapter 3.). This is beside the lack of funds (or inefficient use of funds) the lack of leadership performance measurement.
- At present, Hungary does not expend money on research to measure the relation between performance of school leaders, pupils and the studying. Even so more recognize the importance of these types of researches and the school’s appearance as a studying organism.
- Within schools, the functioning of network study is difficult. It is not known how much of the know-how learned at leader-forming schools are actually used in and adapted to the institute.
- Connection of school leadership and “lifelong learning”

5.2. Monitoring of school leaders’ supply and demand

194. School leaders’ supply and demand – according to the Informational System of Public Education’s (ISPE (KIR)) data – at present has no national monitoring. Regarding this issue, some local government gathers data on local level, but – where is such a system – only consider the proportion of candidates and the number of available positions and do not use any other indicators. (In Nyíregyháza, for example, the proportion of supply/demand is below one). In demand, a slight improvement can be sensed lately. According to the interviewed persons’ subjective opinion this was one of the positive effects of the 2002 increase in wages (about the public functionaries’ increase in wages see more in Subchapter 2.3)

5.3. Changes in compound and characteristics of school leaders in the past years

195. Although the public education law from 1993 makes difference between some basic types of schools (general school, lower grade institute of arts, professional school, grammar (high) school, vocational secondary (technical) school, multipurpose institute) – see Annex 2 –, in the same time, gives an outstanding freedom to maintainers and schools to choose the educational programmes offered by schools. As said before, the school system is very varied both horizontally (the content of teaching) and vertically (the level of education). In this way a school not only on one level offers education but steps across levels (e.g. grammar (high) schools can start the six or eight grade education); there is an interconnection between general and technical schools (e.g. general schools offer technical education programmes and grammar (high) schools offer technical (vocational) education programmes).

196. Because of all enumerated above, it is difficult to configure a number of manageable schools, alongside which organizational characteristics (e.g. the of school principals) can be analyzed. (The Ministry of Education and Culture’s statistical publication does not inform about the number of grammar (high) schools or vocational secondary (technical) schools in Hungary. There can be only found the number of those institutions that offer either technical or high school type education – namely mixed education programme high schools are represented both at grammar (high) schools and vocational secondary (technical) schools).

197. This variety is shaded by the fact that educational programmes’ calibre is very different in schools. It happens that schools start technical education only to be eligible for the technical education contribution but the basic functioning mechanism of schools does not change. Taking into consideration the calibre of programmes (e.g. the number of pupils), the categorization of schools could be possible, but due to lack of former data about schools, this calibration is not possible.

198. The trend analyses are made even more difficult by the fact that the regulation frame changes in time, this leads to new type of institutes and disappearance of the old ones (e.g. before 1993 the

were industrial schools). The change in the content and function of the institutes can lead to difficulties in comparing them.

199. Taking all the above into consideration, in the next trend analysis the characteristics of school leaders will not be analyzed according to school types but the content and level of education/instruction. While according to the content of education, we can distinguish institutions that offer general education, vocational instruction and mixed instruction, according to the level of instruction there are institutions that offer first grade, second grade and both type of instructions. These two types of classifications offer a better comparison between diverse types of schools. The classification of institutes into categories used to be according to instruction programmes attended by group of pupils.

5.3.1. The characteristics of school principals according to the type and level of education

200. The below trend analysis are based upon four data collection made by National Institute for Public Education (OKI). These were effectuated in 1991/1992, 1996/1997, 2001/2002 and 2004/2005. The number and distribution of schools participating in the surveys:

Table 5.1.: The number and distribution of schools participating in the survey about school principals

	1991/1992	1996/1997	2001/2002	2004/2005
According to the level of education				
Only first grade education	477	830	574	549
Only second grade education	150	274	142	316
Mixed schools (both first and second grade education)	19	55	65	112
According to the type of education				
Only general education	520	934	623	651
Only vocational education	109	167	110	229
Mixed schools (both general and vocational education)	17	58	48	97
Total	646	1159	781	977

201. In the institutions the average age of school principals increased¹³:

- Between 1991 and 2002, the average age stagnated in the first grade education institutes, but increased by two years by 2005-2006.
- In the past 15 years, in the second grade education institutes the average age of school principals gradually increased (the last period analyzed shows that some schools already have younger principals).
- In general, in the mixed institutes the average age also increased.

202. The changes in the average of age according to the content of education:

- The average age of general school principals stagnated; increased in 2004/2005 (not a surprise because most of the general education institutes are general schools, so the same trend applies here as in the first grade education);

¹³ In the examined 15 years the ratio of different schools has changed. For a correct analysis, should be taken into consideration how much of the change occurred because the alteration in the composition of the population. E.g. if younger principals are in front of general schools because lower education is enough, so they start younger their pedagogic career, then the rational increase of general schools lead to decrease of average age. Because the lack of information this consideration is looked over.

- In vocational education and mixed type of education institutes the increase of average age can be observed, mostly the principals of professional/vocational training institutes are getting older.

Table 5.2.: The variation of the average age of school principals according to the level and content of education

	1991/1992		1996/1997		2001/2002		2005/2006	
	average	deviation	average	deviation	average	dev.	average	dev
According to level of education								
Primary schools	46,83	7,44	46,73	7,54	46,66	6,99	48,94	7,36
Secondary schools	47,27	7,01	49,52	6,47	51,50	6,62	51,66	8,23
Mixed schools (both primary and secondary schools)	47,11	8,21	46,90	6,32	47,95	7,48	49,96	7,53
According to the content of education								
General education	46,78	7,49	46,86	7,48	46,80	7,01	48,85	7,45
Vocational education	47,41	6,49	49,17	5,90	51,25	6,39	52,14	8,32
Mixed schools (both general and vocational education)	48,81	8,52	50,91	7,05	50,38	8,13	51,99	6,93
Total	46,94	7,36	47,39	7,34	47,64	7,20	49,93	7,76

203. Although the average age of teachers have also increased in the past years, the principals are even older. This relation lessened between 1996 and 2002 (8.5 years in 1996 to 7.1 years in 2002), but the magnitude of this difference did not change significantly (Balázs, 2004; there is no analysis for 2005 yet). The cause of this significant difference might be that the basis of the principal's authority is based upon the years spent as teacher and not on the leader qualities. (Vágó, 1998).

204. The following table shows the increase of the average age of school principals; also the change of openness of school principal position. Based upon data, there is no possibility for a trend analysis (the data from 1996 is missing), but can be noticed that from 1991 to 2001, second grade education, all education except professional/vocational training, renewed (major increase in the ratio of newly nominated principals, whilst the ratio of 16 years ago nominated principals decreased). By 2005, the situation turned and everywhere the ratio of the newly nominated principals dropped back below the 1991 rate (in the case of professional/vocational education and second grade institutes it happened by 2001). Except at the several level instructing educational institutes, everywhere increased the ratio of principals nominated more than 16 years ago. This can be explained with the close of the position (the principals already in position obstruct the aspiring young ones), the decrease of the attraction of the position (there are no eligible candidates).

Table 5.3.: Time spent in the principal's position

How long do you fulfil the principal's position? (%)												
	1991/1992				2001/2002				2005/2006			
	0-5 years	6-10 years	11-15 years	16 years or more	0-5 years	6-10 years	11-15 years	16 years or more	0-5 years	6-10 years	11-15 years	16 years or more
According to the level of education												
Primary schools	51,47	22,90	10,92	14,71	55,48	24,35	12,90	7,26	40,29	28,39	20,33	10,99
Secondary schools	61,33	18,67	10,00	10,00	42,20	25,69	22,94	9,17	42,68	25,16	18,15	14,01
Mixed schools (both primary and secondary education)	47,37	26,32	10,53	15,79	54,17	16,67	14,58	14,58	39,64	29,73	19,82	10,81
According to the content of education												
General education	52,02	23,12	10,40	14,45	55,87	23,99	13,31	6,83	41,11	28,44	19,78	10,66
Vocational education	65,14	16,51	9,17	9,17	43,97	22,70	21,99	11,35	40,97	25,11	18,50	15,42
Mixed schools (both general and vocational education)	29,41	23,53	29,41	17,65	53,85	27,69	7,69	10,77	40,21	26,80	20,62	12,37
Total	53,63	22,10	10,66	13,60	53,54	24,07	14,41	7,98	40,99	27,50	19,57	11,95

205. The feminization of the principal's position – according to some researchers (e.g. Balázs (2004)) – shows the loss of social weight and value: until 2001 in every category the number of male principals gradually decreased. In 2005/2006, this trend continued in every school but the mixed education type ones.

Table 5.4.: The ratio of male principals according to the level and content of education

	1991/1992	1996/1997	2001/2002	2005/2006
According to the level of education				
Primary schools	53,46	44,68	41,27	37,70
Secondary schools	71,33	71,21	65,14	61,59
Mixed schools (both primary and secondary education)	63,16	53,06	52,08	60,36
According to the content of education				
General education	54,42	46,14	39,12	41,23
Vocational education	76,15	76,10	63,12	60,96
Mixed schools (both general and vocational education)	47,06	64,29	60,94	62,89
Total	57,87	51,50	45,32	48,00

206. The ratio of principals with university degree increased slightly from 1991 to 2001 (the analysis of Éva Balázs shows that considering the whole pattern, it is not a monotonous increase but an ascent till 1996 followed by an attenuation by 2001; see Balázs (1996)). The ratio of principals with a university degree is very high in second grade and professional education compared to general schools. The cause of this is that the law requires university degree to fulfil the principal position in high schools other second grade education institutes. Data from 2005/2006 is only informative because only shows not the highest but the first degree.

Table 5.5.: The distribution of principals according to degrees obtained, between different level and content of education institutes (%)

	1991/1992*		2001/2002*		2005/2006**		Ratio of persons with more
	College	University	College	University	College	University	
According to the level of education							
First grade education	75,00	25,00	71,87	28,13	93,99	6,01	76,50
Second grade education	14,19	85,81	11,76	88,24	41,08	58,92	84,76
Mixed schools (both first and second grade education)	57,89	42,11	6,35	93,65	40,54	59,46	85,71
According to the content of education							
General education	70,91	29,09	66,56	33,44	83,41	16,59	76,80
Vocational education	18,69	81,31	12,38	87,62	45,81	54,19	85,96
Mixed schools (both general and vocational education)	5,88	94,12	10,64	89,36	44,79	55,21	89,69
Total	60,47	39,53	55,47	44,53	70,84	29,16	80,23
* the highest degree is indicated							
** the first degree obtained is indicated							
*** in 2005/2006, only 50% of the interviewed answered this question							

207. In the past 15 years, there were no researches about ethnicity and educational experience.

5.4. Why eligible candidates do not choose the leader's position?

208. According to one of our interview, subjects to one principal position there are 1.2-1.3 candidates in average. Assumingly the number of candidates varies in diverse type of settlements. In major cities, the number of candidates/position is greater than in smaller towns (contradictory to this, in Nyíregyháza this number was 0.8). The latter one might refer to the fact that in smaller towns the principal position is less attractive, but also to the fact that on these settlements the call for tender is just a formality, informal decisions were already made (in a small village/town everybody knows each other), and potential candidates do not even bother to present their application. This is very true when the nomination of the local school principal is a political decision.

209. Beside the low number of applications to the principal position, the actual principals are getting older. The below table clearly shows that the increase of average age of principals continued in every type of settlement.

Table 5.6.: The average age of school principals according to the settlement type of the school

	1991/1992		1996/1997		2001/2002		2004/2005	
	average	deviation	average	deviation	average	deviation	average	deviation
Budapest	46,2	7,5	47,5	7,1	50,8	7,6	52,0	8,4
Cities	46,4	6,3	48,8	6,9	50,1	6,7	51,8	8,1
Towns	47,1	7,5	49,1	6,5	49,8	6,8	51,9	7,4
Village	45,1	8	46,1	7,7	46,7	7,5	49,2	7,3
Total	46,1	7,5	47,4	7,3	48,6	7,4	50,93	7,76
Source: data from Balázs (2004) and Iskolakutatás 2004/2005								

210. Among principals nominated less than 5 years further decreased the ratio of principals below 40 (parallel to this, increased the ratio of those above 40).

Table 5.7.: The distribution of school principals according to age groups and the settlement type of the school (%)

	1996/1997				2001/2002				2005/2006			
	Below 40	40-49 years	50-59 years	Above 60	Below 40	40-49 years	50-59 years	Above 60	Below 40	40-49 years	50-59 years	Above 60
Budapest	22,4	43,4	32,9	1,3	8,5	32	47,7	11,8	6,6	32,5	43,7	17,2
Cities	15,1	36	47,7	1,2	7,1	35,5	51,3	6,1	5,8	31,4	41,5	21,3
Towns	9,3	48,1	41,1	1,5	9,6	34,4	49,8	6,2	7,3	25,7	50,6	16,5
Village	26,7	42,2	30,1	1	20,3	43,5	32,4	3,8	11,9	35,8	45,2	7,1
Total	22,2	42,6	34,1	1,1	13,8	38,3	42	5,8	8,50	31,42	45,34	14,12

Source: data from Balázs (2004) and Iskolakutatás 2004/2005

211. The low number of applicants, aging and the decreasing number of young candidates can be explained with the unattractiveness of the principal's position and the closing of the position in front of the young. The cause can only be supposed:

- The competencies necessary for a school leader (fund raising, networking) are not necessarily the same as competencies gained, as a teacher requires intuition, has many stress factors in it, which can be retentive for the potential candidates. Regarding the financial part, there is only a slight difference in the salaries. (See the chapter about compensation).
- From the principal position there is no real advancement, no career (but this is also true for the teacher position as well).
- The limitation in decision making (many responsibilities, few appliances): the scope of duties is extremely large, regards every aspect of school management. The fulfilment of the parents' demands, the practical realization of local concepts put a real weight on school principals. Nevertheless, the principal's field of movement and decision-making are limited not only by laws and decrees, but also by the preconceptions set up during the years.

5.5. The ratio of candidates for school leader position

212. About the characteristics and ratio of candidates for school leader position may have been survey only at maintainer's level. National level survey or at least one that would embody data from several maintainers was never made.

5.6. Filling of vacancies

213. In state schools, the method to fill a vacancy is regulated by law and regulation¹⁴. Although there can be different criteria towards school leaders, the application and the selection procedure's basic elements are the same.

214. The opened school leader position is filled in decentralised by an open competition. The prolongment of the position also has to be preceded by an open competition. The call for tender – of which content is regulated by decree – has to be published in the Ministry of Education and Culture's official gazette. For the principal position – a candidate from outside school, the former principal or a teacher from the teaching staff – has to hand in a managing programme which contains the candidate's ideas, aims. The entire staff of the school decides which application will be supported. Before the standpoint of the personnel, the institute's teaching staff forms an opinion – the professional teams of teachers' opinion is written down even before this – about the leader application. Because the school's

¹⁴ Law number LXXIX from 1993 regarding public education and law number 138/1992 regarding public functionaries, governmental decree X.8. dealing with public education

basic aims are (adopted by the educational body, approved by the maintainers) laid down in the pedagogical programme, during deliberations, the interconnection between the pedagogical programme of the school and the candidate's own programme is a major decision factor. The educational body's support for the new leader can be dependent on the application but also on the acceptance of the existing pedagogical programme. Because the candidates number is very low, most of the time the competition between professional programmes does not exist.

215. Apart from the educational body, the trade union's local organ, pedagogical trade union, school's council, parents community, student union, and in some cases the representative of the local government of the minorities; in case of professional/vocational institutes, the chamber of economics can express their opinion on the principal's application. From candidates the employer (in case of state schools the general assembly of the local government) will choose. The above mentioned opinions can have an impact upon the employer/general assembly of the local government but does not obligate them to anything. The assignment is at least for 5 years and for 10 years at top.

216. In special cases, the principal's position can be fulfilled without competition. The appointment is made by the general assembly of the local government. Special cases are:

- the establishment of a new institute,
- unsuccessful application,
- the cease of the position before the limit,
- when the mandate of the principal ends 2 years before reaching the retirement age.

217. In the first three cases, the assignment can only be made for maximum 1 year; in the fourth case until the day, the principal reaches the retirement age. To summarize, can be said that the selection system is decentralised, and a central regulation of supply and demand is not possible. The central power can only indirectly help the supply and demand, using an informational system or by strengthening the mobility (basically not by regulating but stimulating).

218. The decentralised selection mechanisms allow institutes belonging to local governments, churches, foundations to set up various expectations toward school leaders. About the content of these expectations, there is no survey so far. If there were a pattern, this would change from one settlement to other, from maintainers to maintainers. For the disparities, the particular problems of the settlements, the difference in pedagogical expertise of the maintainers would be the explanation.

- State maintainers greatly depend on the size of the settlement and its income. Smaller local governments cannot employ a referent dealing only with educational issues so they are less capable to formulate coherent, clear expectations and to supervise their realization. Greater local governments are interested in competency assessments, with help of which they can select candidates. The stress is upon strategic approach and communication abilities.
- Maintainers of church institutions (mainly the Catholic Church) can have a more direct supervision of their institutions because can actuate various functions of support, supervision and expertise.

The Catholic Church does not call for tender to fulfil a position. In the selection of the leader, beside the expertise in education and management, an important role has that the candidate can transmit to the school the values, principles of the church.

- In case of foundation and association schools, the roles of maintainers and school leaders are often the same.

A part of foundation and association schools were created with a particular pedagogical programme by a community of parents/teachers in order to the school would be in accordance with the requirements of the law, and to assure the material and legal background through the foundation/association. In this case, the maintainer's role is not separated keenly from the school leader role. Either the real leader of the school – who is elected most of the time – decides as a school leader or as maintainer (the other position is fulfilled only formally in accordance with the law).

The other type of foundation and association schools were created for business purposes, to supplement a shortage of the profession market. The differentiation between maintainer and school leader is valid only for greater schools (school leaders are often “bought” from outside), in smaller schools the maintainer decides, the school principal has only facade independence.

219. One of the most common ways of exercitation of supervision is the selection of an adequate school leader. The precondition to this is that the maintainers have the possibility to choose from the candidates, to be an adequate recruitment base, an institutionalised supply of leaders. Within the Catholic Church, this problem is solved. In case of state schools and foundation and association schools both the recruitment base and the supply has difficulties.

5.7. The characteristics of school leader employment

220. The LXXIX public education law from 1993 stipulates the necessary conditions for institute leaders. The principal assignment is for a determined period: min. 5, max. 10 years. The period of employment does not change in different types of school, the requirements do. In general, the law defines three conditions of the assignment (18. § a-d):

- *Proper qualification*: higher education (in case of high schools, university degree), professional training, and special pedagogical examination. The law can state that in case of special institutes (e.g. special need children education institutes) the candidate should have special qualifications. For the prolongment of the leadership, assignment is necessary the leader should have leadership training (its importance is abated by the fact – according to the recent amendment of law – that this demand must be validated only from 2015).
- *The existence of proper practice*: at least five years of practice as a pedagogue (can also be included teaching in higher education institutes, experience in public education management, and time spent in pedagogical-technical institute). Depending on the type of the institute, other experience can also be relevant: time spent in artistic schools, artistic career; in professional/vocational schools time spent as practical tuition leader.
- *Employed as a pedagogue in certain institutes*: in schools pedagogues can be employed for determinate period of time and for indeterminate period of time. The condition for the assignment for school leader is the work contract for indeterminate period of time. If the person does not have it, on the moment of the nominalization, has to be signed one or change the existing work contract for determinate period of time.

5.8. The process and frequency of school leader’s assessment according to the type of the maintainer

221. At present, there is no uniform assessment process. Depending on the situation of the maintainers, unique solutions are born, mainly at those who have several schools and the necessary material background to maintain groups of experts. To the assessment is given a natural rhythm by the fact that the prolongment of the position requires call for tender, but the possibilities fade away because the low number of candidates.

222. In less attractive schools, there are no possibilities for real performance expectations. The decentralised function, the formulation of the expectations, the lack of performance assessment does not make possible the identification of the inefficient leaders. If this happens somehow, there are no ways for sanctioning. Characteristic for state school is the fact that they regard the frequency contraventions, the economic results of the school and the possible labour suits as criteria of the school management.

Some local governmental maintainers run complex performance assessment systems. In a city in South Hungary, in Szeged, with the help of assessment advisors together with the teaching staff, evaluate in seven dimensions the work of the school leaders. Part of the dimensions regards the leader's managerial activities, the remaining parts the pedagogical activities. The dimensions are as follows: (1) pedagogical activity of the leader, (2) the leader's supervising-evaluating-stimulating activities, (3) creation of the functioning conditions, (4) management of partnership relations, (5) the relation with colleagues, (6) the social influence, (7) the leader's character, abilities, style.

223. Regarding the assessment of school leader's performance, non-state maintainers represent a particular segment. Church maintainers are more conscious in the assessment process, they exercise a better control. In this sector there is an assessment every three years and includes 5 areas: resources (human and material), strategy, leadership and organizational culture, key processes (teaching and education) and results. Based on results obtained plans for the next period are drawn up.

224. In the case of foundation and association schools there are two features which determine the characteristics of the assessment: in one hand, the insecure existence of the school requires a more often feed-back from/toward the parents, which leads to a better control of daily decisions. On the other hand, the dual blurry role of maintainer and school leader weakens the control over the accountability and rarely happens that an assessment would take into account the long term effects of the leader's decisions.

225. During the maintainer's assessment one point of view can be the assay of measurement result comparable to other schools' (national competence assessment, city measurement, inner measurement, test secondary school-leaving examination, etc.). Although this is just a possible way of maintainers assessment, worth taking a look on the 2004/2005 results of school research. Table 5.8 only partially supports the presumption that the frequency (and sophistication) of the assessment is in relation with the type and size of settlement.

Table 5.8.: Does the maintainer of the school take into consideration the results of the assessments?

		Number of schools	Yes	No	Does not know	Total
Type of settlement	Village	176	35,8%	63,1%	1,1%	100%
	Incorporated town	125	36,8%	63,2%		100%
	Small town	314	34,2%	60,4%	5,4%	100%
	City	208	38,3%	54,4%	7,3%	100%
	Capital	153	51,0%	41,7%	7,3%	100%
Type of maintainers	County or capital	150	38,5%	53,4%	8,1%	100%
	Local government	682	37,6%	57,5%	4,9%	100%
	Church	54	40,7%	59,3%		100%
	Private	90	41,6%	58,4%		100%
Level of education	Primary education	546	40,8%	56,0%	3,1%	100%
	Secondary education	313	36,1%	58,1%	5,8%	100%
	Both	112	32,1%	58,9%	8,9%	100%
Content of education	General education	647	40,5%	56,0%	3,6%	100%
	Vocational education	227	37,0%	56,4%	6,6%	100%
	Both	97	26,8%	66,0%	7,2%	100%

Source: Iskolakutatás, 2004/2005 assessment

226. In the capital, most of the maintainers use the results of assessments during the evaluation. Regarding this, there is a serious gap between the capital and the province, but there is no relevant difference within the province itself.

227. Between maintainers there is no relevant difference but it seems that the non-statal maintainers are more likely to use the results of the assessments (it is also true that proportionally more people say that they do not use the results in these schools). There are no differences regarding the level and content of education in schools.

5.9. The elements of the compensational package and the salaries of school leaders

228. Hungarian pedagogues and institute leaders are public functionaries which mean that their status is different from the classic one. About the type of employment of public servants, we have already discussed in subchapter 2.1.2. The situation of school leaders and pedagogues cannot be understood without the logical comprehension of the regulation of public servants.

229. According to OECD's international comparing analysis (OECD, 2004), the regulation in effect in Hungary is the system based on time worked/served (this is also called career-based system or closed system which pair is based on organizational position, position-based, open system). The systems based on the time worked have four peculiarities, that can be found in the treatment of human resources regulations and as such can be found in the principles of allotting for school leaders:

- The aspiration for long term commitment (e.g. the salary is based mainly on the years spent in public service, and only in very low percentage is based on performance; the maintenance of the assignment is based on long term non-monetary incentives).
- The preference of cooperation and conflict-minimising instead of competition and productive conflict search (e.g. at the determination of the salary the correlation point is not the salaries on the labour market but the proportionality between public servants)
- The preference of collectiveness against individualism (e.g. for differentiation of salaries based on individual characteristics there are only slight chances; the important aim is the formation of the pedagogue's identity), as well as
- The centralised, prescribing type of regulations against the decentralised frame type regulation (in the personnel matter questions the law allows a minor freedom to school leaders, at institutional level in most of the questions only the implementation realises – except hiring).

230. The allowance of institute leaders, the elements of the compensational package can be examined in the following model:

Table 5.9.: The elements of school leader's compensational package

		Allowances from organisation/public service legal relations		Other earnings
		Financial allowance	Payment in kind	
Present allowances	Basic allowance	1. salary	2. health insurance	3. security of work, prestige, social privileges
	Supplementary allowance	4. travel and meal financial aid, interest support for house acquisition	5. meal voucher, season ticket	
Future allowances		7. pension	8. dwelling	

Source: Worldbank 2000

1. Basic financial allowances

231. The compensation and salary system of institute leaders correspond to the pedagogues' and public employees' system. The salary is compounded from two elements: basic payment and allowance.

- The amount of the basic payment is depends on the qualification and the time spent as public employee. This type of basic payment is defined by the law as the guaranteed minimum salary, so the employer can give more than this minimum (if possible, if wished).
The pedagogue, respectively the leader, every three years advances one level up in the classification, but in case of outstanding success, decoration, award (if other conditions are also fulfilled, e.g. the necessary qualifications exist), once every seven years can be reduced with one year the anticipation period for higher level. (Kjt 60-65), (Kjt 65/3)
The law allows the employer to grant to the leader/pedagogue additional payment (Kjt 67). This can even be possible based on performance, namely the law allows these types of additional payments.
- The other element of the salary is the system of allowances. The allowance can be granted for additional duties: form-master, student's government or institute leadership. A part of the allowance has to be given obligatory, the other part is optional, depends on the decision of the maintainer (e.g. honorary principal title or the close up allowance). The amount of the optional allowance can only exceed 75% of the base allowance if portion above 75% can be ensured without the support of the central budget.

232. The system recompenses the work of the leader in two ways:

- If the leader, besides the minimum qualification required for the position, disposes of other qualifications, which can be used in the teacher/pedagogue profession or has

financial, economical, legal or accountant qualifications, then the guaranteed minimum salary increases by 5-10% (depending on the number of recognized qualifications and other expertise necessary for the position).

- The leader position comes with an allowance which is minimum 200-250% of the basic allowance, depending on the number of compulsory lessons of the leader and on the amount of the institute's /regional/national assignments (the basic allowance on the 1st of January 2005 was 18900 HUF, while the basic allowance of the salary group G and H for leaders, was 117700 HUF, respectively 120400 HUF on the 1st of September 2005).
- To the optional allowance belongs the honorary principal's allowance, which can be granted by the maintainer after the expiration of the leadership assignment

2. Payment in kind

233. Leaders – alike other pedagogues and public employees – have health insurance.

3. Present other earnings

234. The leader's position is for determined period of time and can be revoked at any moment. If the leader contests the legality of the revocation, the employer has to prove the reality and reasonability of the revocation.

235. The condition of the leadership is the employment for undetermined period of time as pedagogue that does not end even when the leadership finishes. For school leaders – alike for other pedagogues and public servants – is due the safety/security of work. This security's most important element is that after the leadership position ends, the employer has to employ the ex leader in a position suitable for his/her qualifications. If the ex leader does not accept the position offered, or the employer is not able to offer such a position, the ex leader is entitled to relief time and severance pay.

236. The undetermined period of time employment can be terminated by the employer only in special cases. Reasons can be the cease of the position, reorganization, and the decrease of financing (if the Parliament, the Govern, the Minister or the general assembly of the local government decides about it). Even in this case, the employer has to try to employ the pedagogue/leader in a position suitable for his/her qualifications. Beside these, the pedagogue/leader can only be exempted from duties if is lastingly unfit for the position or does not perform well on the job. The proving of this fact lies upon the employer. Among the present earnings has to be mentioned that school leaders – mostly in smaller settlements – are part of the political elite, which insures them significant informal influence.

4. Other financial allowances

237. Leaders – alike other pedagogues and public servants – are entitled to the following supplementary allowances:

- Every year, as separate allowance, one-month worth of salary (13th salary). (Kjt 68)
- Jubilee allowance (after 25 years as public servant 2 months worth of salary, after 30 years 3, after 40 years 5 months worth of salary) (Kjt 78)
- The state guarantees for habitation bought/built from credit (Kjt 78/A)

238. According to the law, leaders do not qualify for other (centrally financed) monetary allowances.

5. In kind allowances

239. Public servants (also pedagogues and leaders) have travel discounts, meal vouchers. Beside this, most libraries, cultural institutes give entrance discount to contracted pedagogues.

6. Future financial allowances

240. School leaders do not qualify for special pension preferences. On the contrary: the condition of participation in one of the preferential pension programme (premium years programme) is to renounce the leadership position (see about the conditions of retirement, chapter 5.11)

241. The compensational package of church and foundation school leaders are very much alike state school leaders. The reason for this is that churches and foundations accepted to pay pedagogues according to public servant's law and they consider every element of the law (days off, extra lessons, etc.). The church and foundation sector, because the dependence of funding, rarely allow deflecting upwards from the minimum salary.

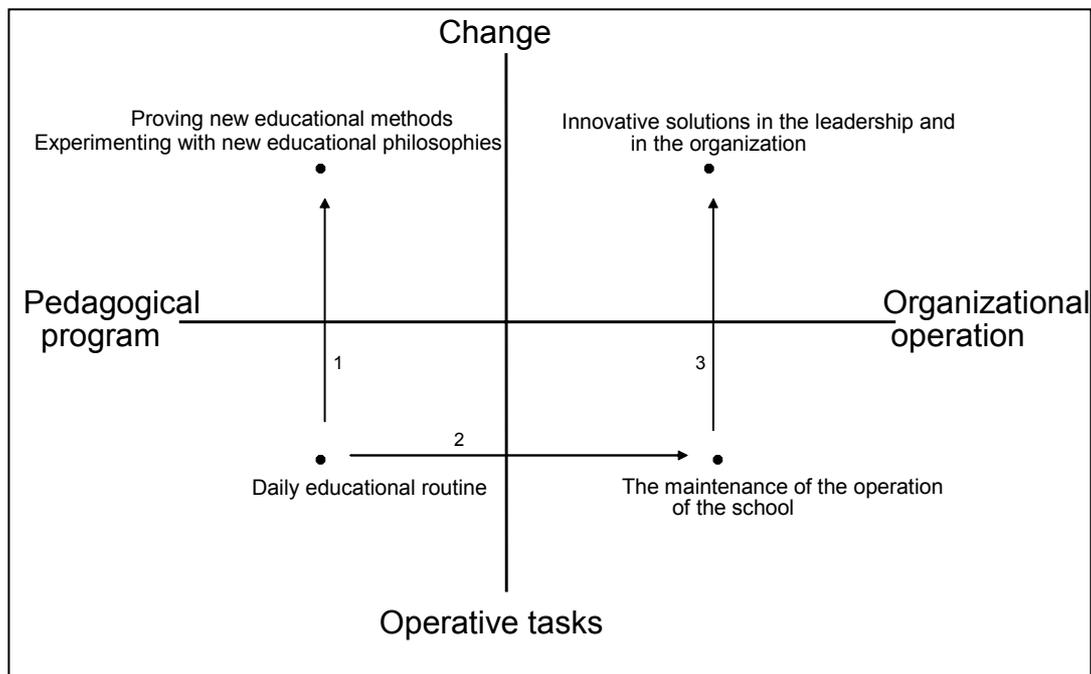
242. The result of the public servant's law is that from the point of view of the allowances, there are no major differences between leaders and other public servants. At present, there is no such a survey that would show the real differences in allowances of pedagogues and leaders. Because of the decentralization of the school system, maintainers can grant other allowances to leaders (habitation support, lodgement support, salary compensation), but there is no national survey about this. There is also unknown the amount of allowance granted for different other activities, which the leader fulfils only nominally, – not necessarily related to school leadership –; honoured is actually the effort for other type of leadership functions.

5.10. The career perspectives of school leaders: long-term career or short-term assignment?

243. The pedagogical profession – and the school leadership as well – has its particular contradictions. Meanwhile the philosophy of public servant career is based on long-term employment – which is reflected in the advancement system –, the pedagogue work's nature and responsibilities hardly ever change during the years. The pedagogue's career, on long-term basis, cannot assure the possibility of renewal. This potential depends on the inner function of the school. In most cases is enough, many examples are from church and foundation schools that were established to carry out some particular pedagogical programme. In these schools, the change (evolution) of the system is the source of renewal of the pedagogical work.

244. Where the school's inner conditions can not assure the renewal, the feeling of personal development, the pedagogical career does not offer alternatives; for the law assures the advancement only in classification (consequently in salary), but does not refer to the classic meaning of the word "advancement", progress in the hierarchy. In other words, one possible form of renewal is if the pedagogues perform on the same duties but experience every time differently (e.g. tries different educational methods). The other form can be to undertake other assignments, for example advances in the hierarchy. (In the chart below the first way is indicated by point 1 while the second way is indicated by point 2)

Figure 5.1: Ways of renewal in the pedagogical profession – the management of institutions as a possible breakout



245. Leadership can be an outbreak for those who, in their pedagogical work, are not able for renewal. As school leader, the characteristics of the assignments and the skills required change: management and leading assignments have priority. At the same time, from the leader position there is no natural advancement within the education system. The ex leader either returns to the pedagogical work or works in a different segment of the educational sector (school management, counselling) or tries to find work outside the didactic system.

246. There is also a problem that the possibility of “respectable retirement” is not solved yet. If somebody retires before the retirement age – according to an interview subject – feels like “failure”. The long-term career approach is also obstructed by the fact that school leaders must be pedagogues. Pedagogues, on the other hand, cannot break away from the regulation logic learnt on the universities, and often lack strategic leadership and management skills, which are indispensable for long-term plans as school leaders.

247. Such as the reformation of pedagogical practice for the pedagogue, the creativity noticeable in management practice might serve as a challenge for the institute leader, which can regenerate the lure of the post of the institute leader from time to time (see number 3 on the above graph). However, similarly to the state of pedagogues, it is true this case that regulatory environment never serves as the source of this regeneration, but the inner characteristics of the school (like its atmosphere), furthermore the institute leader’s personal skills and abilities do. In other words, the creativity of the educator and the institute leader cannot be evoked directly for example by a better regulation, rather indirectly by the alteration of the conditions of school environment.

5.11. Retirement age and pensioning of school leaders

248. As mentioned before, there are no regulations for school leaders pensioning. For old-age retirement, they have to comply with those regulations, valid for every pedagogue or public servant.

249. As main rule, the condition for pension entitlement is the reach of the pensionable age (at present 62 years) and (at present) 20 years period of service. Those who have less than 20 years are eligible for part-pension. (There are special rules as well: the retirement age depends on the year of birth; taking into consideration, the period of service depends when the person reached the retirement age, etc.).

5.12. The institutionalized process of leader succession

250. The only institutionalized form of leader supply is the leadership hierarchy within schools. The law, in certain situations, prescribes the assignment of an assistant principal, but besides this, there is no in-between position that would suggest the advancement toward the leader position within the school system and would prepare the pedagogues for the challenges of the new function. Formally, there are middle positions (e.g. the head of professional team of teacher, whose aim is the joining of forces among teachers who teach the same subject. These leaders have no real jurisdiction; they only have informal influence based on their personal capabilities and not on their position in the system. The leader career would not only be a motivational tool but also a practice field for the conscious development of the leadership abilities.

251. As mentioned before, the diminishment of the ratio of newly nominated leaders and the closing of the leader career (see subchapter 5.3), show that the institutionalized processes of leader succession – if there are any – do not work.

252. In the case of foundation and association schools, even less can be mentioned about this subject. This is mostly characteristic for schools which aim is the realisation of a pedagogical programme. Here, the connection between the professional programme and the realising person is very powerful (often one programme is identified to only one person and cannot be imagined with another person). Not even for the business purpose schools are typical the inner breed of leaders. If not the founder fulfils this position, they try to bring a successful leader from the outside. The greater control within church schools allows a greater room for conscious leader development, so they follow with superior attention the development of leader competences of the capable pedagogue.

5.13. Initiatives for recruitment and retaining of school leaders

253. On policy level these type of centralised aspirations did not materialize in great number yet. At present, mainly different local governments have this task if they feel the necessity of these types of efforts. Among the centralised actions can be remarked:

- The enlargement of school leaders legal range, in order to avoid the “incapable school leadership”,
- The raise of public functionaries’ wage,
- Compensational packages concerning leaders.

254. Major part can get the training programmes and the collective attendance of these. These are not only for leaders but also for all the employees of schools thus motivate them to attain leadership positions within the school. In order to help collective consciousness, nowadays’ leader training programmes focus on knowledge transfer, helping this way the occurrence of multilateral school employees (would be leaders). From the viewpoint of cost and performance, these dispositions cannot be measured.

5.14. The future priorities of school leaders' recruitment and retaining

255. The most important future priorities of school leaders recruitment and retaining can be examined in one hand, from the stance of present and aspiring principals, on the other hand from the local governments', state's and legislature's point of view. Nonetheless, there are some key elements that are priorities for all three target groups. These are:

- To assure, on policy level, the adequate standard of in-service trainings; in order to this, is needed the definition of the standards expected from the trainings and the trainings' successfulness measurement. The training of the leaders and the transmission of the knowledge of leadership are of great importance in respect to the preparedness of the leaders. In this regard, it seems to be an unfavourable situation that the acquisition of leader skills is the precondition of the reformation of the institute leader's post (and not of the occupation of the post) only from 2015/2016.
- To make the school leader career more attractive. In order to do this, one question has to be answered: is it enough to raise school leaders' wage without expanding their authority and autonomy? The personal conditions of leadership have to be improved, because nowadays a lot of work, lack of feedback and limited material interests, characterizes the conditions.
- The most important elements in school leadership are authority, assessment and the assuring of publicity. The latter is what today's leaders, within school staff, are afraid to deal with (mainly because political reasons). Many pedagogues avoid these problems by not applying to leader positions.
- The elucidation of the fact that what kind of competencies does a person has to have in order to fulfil the leader position. In this matter, the legislation is not concrete enough yet. Important is choosing those types of leaders, who can act well in the complex connection system of school leadership.
- To improve the level of qualification for would be leaders, which mean the conscious training of teachers and assistant principals.
- Help of long-term career planning, which condition is the accurate, objective leader's performance assessment by the maintainers. For this, is necessary that the evaluation and self-evaluation would be in focus and to expand the adoption of these evaluations. Teacher's correct performance evaluations must not be forgotten about either.
- National "summon" as competency based education, ICT in the education, intensifying the evaluation systems in ambitious leaders, who do not only look at school leadership as "parking space". These stimulate to build around them a team for a more efficient completion of tasks, and by this to stay on the position.

CHAPTER 6 – TRAINING AND PROFESSIONAL DEVELOPMENT OF SCHOOL LEADERS

6.1. Frames, issues and trends of leader training and development

256. In Hungary, school leaders' training and professional development realizes within the in-service teacher training system. For leader preparation and training, higher education institutes offer 2 years master programmes with diploma; its content is detailed in the legislation. The professional development of leaders, short-term programs and courses offering a more profound familiarization with specific management and leadership issues, can be found also within the frame of in-service teacher training system, but the supply for this type of course is relatively low.

257. Of course, there are other ways of leaders professional development besides the one within the frame of in-service teacher training system. One of these could be the participation on seminars, conferences about relevant issues for leaders or the development policies for public education (development within the National Development Plan or the previous Comenius 2000 public educational quality-improving programme) which help to gather more knowledge and experience as leaders. Within this chapter, we will talk more detailed about these development tools. In the chapter we will focus on public education institutes' head, and we will mention the different cases.

258. The Act on Public Education and the related decree nominate the leadership positions of public education institutes and regulate the obligatory qualifications and trainings for school principals¹⁵. As mentioned in previous chapters, according to the legislation, school principals are:

- Public employees,
- Have to have the necessary college or university level pedagogical qualification¹⁶,
- At least 5 years of professional experience as teacher.

259. Neither the previous leader experience (e.g. as head of professional team of teachers teaching the same subject), nor a leadership qualification are the conditions of the leader appointment. The importance of *public education manager training*, of the training in this direction is better recognized nowadays by the education policy; the referring legislation took shape gradually from the mid 90s. The main steps of this process are:

- In 1996, significantly changed the in-service training system of pedagogues. In this year, the Act on Public Education introduced the institution of teacher's post-graduate professional examination, thus accepted as equal the above mentioned, diploma according, professional training programs for public education leaders.
- In 1997 and 1999, a separate decree regulated the in-service trainings and the method of accomplishment of the teacher's post-graduate professional examination.
- From 2002, priority has that candidate who has post-graduate professional examination.
- From 2010, only those receive new mandates for school leaders or leading teachers who have post-graduate professional examination.
- From 2015 the condition of the second or more school leader mandate will be the attain of institute leader qualification.

¹⁵ There is no legislation for the qualifications and professional experience of vice-principals and financial managers.

¹⁶ Except principals of vocational schools. If there is no university level teacher education similar to the school's profile, other persons can also be appointed who have the same university level education as the school's profile and have post-graduate examination for pedagogue's diploma. (Act on Public Education, paragraph 18.§ (4))

260. At present, according to 2002 legislation change, those candidates for school leader position, who have teacher's post-graduate professional examination, will be in advance. There is no prescription what kind of special exam should they have. One of the optional specialities can be leader training; within the past decade, numerous school heads and aspirants participated in this type of trainings.

261. In Hungary, a very important element of pedagogues' professional development is the *in-service teacher training system*. The Act on Public Education obliges teachers to attend these trainings and assures financing for it. About the details of financing, we shall talk in Chapter 6.2.4. This obligation means that within every seven years the teachers have to accomplish 120 lessons of accredited training programs. There is no prescription for *the subjects and contents of school leader's trainings*. There is a variety of trainings for teachers: from the classical special subject trainings to expertise and leader training programmes or foreign language courses and personality development trainings. Leaders freely choose from these trainings possibilities; but the continuous professional development of the leaders is not solved yet and it is not required the improving of leader competences for school heads.

262. The every seven years in-service training, required by the law, can be achieved in 120 lessons altogether (4x30 lessons, 3x40 lessons, 2x60 lessons, 1x120 lessons) and by attaining a new basic diploma, by attending a special training program, by teacher's post-graduate professional examination (the latter three can only be achieved in a higher education institute), by attending one of the higher level special training, found in the National Qualification Catalogue, that is in relation with the teacher's work or helps it in a direct way. From the point of view of the leader training, the special in-service teacher trainings providing post-graduate professional exam are important because most of the attendees take part to this type of public education leader training programmes. According to the relevant legislation (government decree 277/1997), the "preparation for the teacher's post-graduate professional examination helps renew, deepen, supplement the knowledge attained in the basic qualification; the development of the competences needed for the teacher career, can be used in every position that needs pedagogical specialization and gives new knowledge that is not directly related to the basic qualification". The special exam's precondition is the college or university level pedagogical diploma. As higher education institutes organize the special exams, the Act on Higher Education disposes about these exams (e.g. the outlay of qualification requirements, preparation of the curriculum, final exams, etc.).

263. In the 1990s, the National Institute for Public Education, arranged three empirical research survey, according to which, at the beginning of the decade, 2/3rd of school principals had leader qualification that were obtained before the fall of the old governmental system, and the demand for these types of trainings was in ascension. This situation significantly changed in the second half of the decade; in 1997, only 1/4th of the school leaders obtained their leader qualifications. This was due to two factors. The preparation of the own school curriculum and the school level educational programmes was a new professional challenge that required new knowledge; this understandably changed the leader's preferences for in-service teacher trainings. Instead of leader in-service trainings, they took part in professional-pedagogical trainings. The structure of leaders' society has also changed: many new leaders, without previous experience, got in. According to a survey from 2001/02, the participation in leader training programmes increased: on average, 59% of the school leaders had accomplished the training. The reason of the number growth is that those who became leaders in the mid 1990s, tried to recover their handicap but the variety of the training programmes have also increased and many higher education institutes started their own leader training programmes. (Balázs, 2004).

264. The following table shows that in 2001/2002 from the total number of school principals, 94.8% took part in some in-service teacher training, and the majority chose the leader-training programme. The second most popular speciality in every age group, were the informatics, the third the expert training (e.g. quality issues area), followed by foreign language.

Table 6.1: In-service teacher trainings total, the ratio on certain trainings by age groups of principals, 2001/02 (%)

Age group of principals	Took part				
	Total on in-service teacher trainings	Leader training	Informatics	Expert training	Foreign language
Below 40	96,9	54,4	31,7	3,8	5,0
Between 40–49	97,7	67,0	33,3	7,9	6,1
Between 50–59	93,1	55,1	26,8	10,7	2,2
60 years and more	82,1	48,5	11,8	9,0	1,5
Total	94,8	59,0	29,0	8,4	4,0

Source: „Changes on institutional level”, 2001/02 research OKI KK

265. The relatively great number of attendees in the programs shows the interest toward leader training. Significant is the number of those who attend these trainings but do not fulfil any leader position and do not plan to use their knowledge as leaders, deputy principals or even as heads of professional team of teachers. Employed teachers also find important the attainment of managerial knowledge, as teaching staff has a significant influence on school's life and on this forum; the routine in management issues can be very useful.

266. The importance of this issue is also represented by the fact that a major part of the conferences that determine the Hungarian public education's professional life are on leader development issues, moreover for the last 10 years; every year there is a national conference on this topic. This is called "Public education leader development and training" conference. The latter every year chooses questions that interest the professional opinion and overlooks the tasks that concern leader development and training from this point of view. Issues from last years conference topics were social partnership and cooperation; leadership and modern informational technologies in the education, human resources management, school leadership and modern learning environment, adaptive school – renewable system.

6.2. Preparation, training and professional development of school leaders

6.2.1. The selection procedure and professional demands from school leaders

267. According to the law, institute leaders have to have basic pedagogical qualification attained in higher education. In primary general education at least college degree, in secondary schools at least university degree is necessary. Furthermore, for the principal position 5 years of teacher experience is necessary. In reality, newly appointed principals spend more than 5 years in teacher position, because the process of becoming a leader is very slow in Hungary. According to an international survey from 1995, Hungarians, on average, become principals after 20 years of professional experience. School heads are at the same time pedagogues; it is unlikely that they would become from another sector. There can be only one exception. The law allows if there is no university level teacher education similar to the school's profile, other persons can also be appointed who have the same university level education as the school's profile and have teacher post-graduate professional examination (Act on Public Education LXXIX/1993).

268. In case of vice principals, the basic qualification is not necessary to be pedagogical, but they also work as teachers in the institute; they are already part of this sector. The financial manager rarely is a teacher, he/she usually has some kind of secondary or higher professional qualification.

269. The average age in 1992, was 46.1; by 2002, increased to 48.6. The age composition of principals changed unfavourable; comparing to 1997 the ratio of principals below 40 decreased and increased those of over 60. The mobility of the position also decreased. Leaders get into the position at an advanced age and, regarding the tendencies, stay longer than ever, thus worsening the possibilities of younger candidates.

270. The act on public education regulates the selection of institute leaders. The process starts with the maintainer's invitation for application for the position; the nomination for the position is for 5 years. The competition and the selection procedure is very varied, there are major differences between different types of settlements. The main problem is represented by the fact that, in most of the cases, there are not enough candidates, so the reinforcement is not solved. The judgement of applications and the criteria of selection are very heterogeneous, often there are not. Mostly, only in major cities there are evaluation of applications. Local politics influence the selection procedure. For newly appointed principals, there are no support or induction programmes. Nevertheless, there are local governments, which encourage candidates to finish some kind of leader development programme.

6.2.2. The characteristics of public education leader training

271. Public education leader qualification can be obtained in higher education. Its basis is the college or university pedagogical qualification; according to this can be obtained college or university level post-graduate examination. The requirements for public education leader profession are regulated by ministerial decree, which puts down its aims, conditions of performance, content, gives directions to the development of methodology and to the performance assessment. According to this decree, the public leader qualification's

- *Aim:* for public education system's present and future leaders to develop capabilities in educational system and organizational theories, law, leadership psychology, planning, economy which are founded by theory but practice-oriented, and to prepare school principals and other public education leaders and education leading experts to fulfil their position professionally.
- *The precondition of participation in the training:* college or university level teacher qualification or at a profession with what – because lack of teacher training – can fulfil pedagogical position.
- *Period of training:* at least 4 semesters, total minimum lessons: 360 class lessons.
- *Main fields of study and the ratio within the training:* see Table 6.2.

Table 6.2.: Main fields of study of leader training

<i>THEME GROUPS</i>	<i>CONCRETE FIELDS OF STUDIES</i>	<i>RATIO WITHIN TIME OF TRAINING</i>
Strategy	Strategic planning, PR and marketing, innovation, quality and education, theory of educational systems, informational systems	25-30%
Education	Pedagogical and psychological basics, curriculum development and management, differentiated education organization, efficiency of education	20-25%
Organization	Basics of organizational theory, schools as organizations, culture and organization, organizational diagnostics	15-20%
Human factor	Human resources, social psychology, development of leadership skills and capabilities, leadership theory	15-20%
Economy and law	Education law and economy knowledge, educational administration in public education	10-15%

The ratio of dominantly theoretical and practical occupation is 60-40. Within the practical occupation, the obligatory practices: 4 x 3 days.

- *The evaluation system:* consists of the colloquiums, professional practices, participation to trainings, exams, dissertation and final exam, foreseen in the higher education institute's curriculum.
 - Obligatory exam: 2 complex exams are obligatory. Subjects: education planning, drawn up from the materials of strategy and education; education organization, drawn up from the materials of education and organization.
 - Dissertation: the dissertation is the result of a professional assignment, based on an empirical survey, synthesising theoretical analysis or innovative creative work, which proves that the student is familiar with the technical literature and is capable, by himself/herself to synthesise the learn material.
 - Elements of final exam: defence of the thesis and complex oral exam. (The subjects are related with each other and are from major subjects, stressing out the possibilities of practical implementations of the learnt material)

272. The above requirements were elaborated together with institutes that offer leader training programmes. There is great competition in this market, many universities and colleges have these types of programmes. With the most students, the Budapest University of Technology and Economics (BME) has the biggest public education leader-training programme. The second is Hungarian-Netherlands School of Educational Management (HUNSEM).

273. Those prescribed in the decree, give only a wider frame of the training programmes. Worth looking how the two biggest formed their programmes. The *BME* started in 1993, the two years professional training programme for public education leaders. The first class had more than 300 students; by the end of the 1990s, the total number of the two classes, reached 3000 students. At present, there are about 2000 students. In the past 14 years, the programme had many changes. Those can attend the programme, who have higher education pedagogical degree and at least 3 years of teacher experience. The form of the education was, from the beginning, the distance education. Students receive case studies, course books and other materials for certain subjects. (Mezei, 2003).

274. Consultations, training and professional practices help students' individual learning. 5 times, every semester, students are obligated to attend a 7 lessons consultation and to prepare 3 written

papers (individual solution of a problem). Consultation groups contain 16-26 students and for every group one responsible tutor is assigned to, who helps in every subject the students, during the 2 years. When groups are formed, they try to make as heterogeneous as possible: there are employees, experts and leaders: they try to select students who came from different types of schools. 40-50 instructors work with consultation groups as tutors. Consultations are held across the country; at present, there are 18 locations, mainly in major cities.

275. Aside the compulsory consultations, students, once a year, take part on an obligatory training. This has as main subjects: quality management, examination organization, performance assessment, and expertise-expert counselling. In the conduct of the trainings, among tutors, public education experts, economic and psychology experts also take part. At trainings, 20 person groups participate.

276. Another tool of capacity building is that on the first semester, students participate twice on a 2-3 days compulsory school practice, which aim is to study the leaders' work in practice. In the second semester, the location of the practise is the maintainers and regional pedagogical institutes. Students participate in 8-12 people's group. Consultations, trainings and professional practises have different configurations, in order that students could learn from each other.

277. *HUNSEM* is the second largest player. It is functioning since 1998 and was established within a Dutch-Hungarian professional cooperation. The main aim of the consortium is the canalization of international innovation experiences and the results of researches. Besides the in-service training of *public educational manager*, offers 4 more training programmes (quality management expert, micro-regional public education expert, public education administrator and professional consultant) (*HUNSEM* informational publication, 2005).

278. *HUNSEM* offers correspondence courses based on intensive personal meetings. Every programme starts with a foundation phase (two semesters) and in the second year students specialize on one of the five specialization fields (specialization phase). Because the programmes are credit based and due to the common first year, more than one specialization can be obtained. One programme means 360 lessons of personal meeting within the four semesters. During this, students participate at practice oriented theoretical trainings, trainings for development of personal skills, and school and maintainer professional practises. These take place 3-5 times every semester, within 2-3 days of intensive training. Experts and researchers do the teaching of certain speciality. Focusing on personal meetings is high because *HUNSEM* considers very important the successful development of the competencies (skills and capacities). This organization also has several training locations across the country, the courses can be taken in 14 towns. Based on the number of applicants, in 2005, in 6 locations were the trainings started.

279. The below table summarizes the above mentioned and contains information about the expenses, duration and methodology of training.

Table 6.3.: Comparison of BME and HUNSEM public education leader training programmes

BME PUBLIC EDUCATION PROFESSIONAL TRAINING	DIMENSIONS	HUNSEM PUBLIC EDUCATION PROFESSIONAL TRAINING
Approx. 2000 students, from which 30-40% leaders or assistant leaders	Number of students	Approx. 300 students, from which 70% leaders or assistant leaders
- 50-60 consultants, invited experts - 60% higher education qualified tutor, 40% practising professional	Number of tutors and their qualification	- 60-70 tutor, trainer - higher education professors, researchers, experts, practising institute leaders
University or college pedagogical diploma, at least three years of professional experience	Admission requirements	College or university pedagogical diploma, at least three years of professional experience
95.000 HUF (362 Euro) /student / semester, which contains the costs of education, exams, course package (learning materials) and training	Financing	78.500 HUF (300 Euro)/student/semester, plus 5.000 HUF (19 Euro) registration fee. Above all, the students pay the costs of course package (learning materials) and trainings.
1. the system of public education, 2. the psychology of leadership, 3. general public administration, education management, 4.theory of leadership, 5. school management and employment, 6. school administration, 7. content development of education, 8.monitoring of school results, 9.particular pedagogical knowledge, 10.scholar and educational administration practise 11. training	The content of training	<u>Subjects of the foundation phase:</u> 1.theoretical basis of educational systems, 2. management of innovation, basis of quality management, 3.organizational theory, organizational culture, organizational development, 4. strategic planning, project management, 5. human resources management, social psychology, 6. public education governance, education's legal environment, 7. the efficiency and effectiveness of public education, institute's evaluation, 8. personality development, communication and conflict management trainings (2 trainings) <u>Subject of the specialization phase:</u> management theory; operative school management; organizational communication; legal issues of institute management; marketing at schools; management of adaptive education; quality development; efficient school; local curricula.
Distance education, which is complemented by consultation (5 x 7 lessons /year), training (1 weekend/year), school, maintainer and expert professional practise (2-3 days/semester)	Educational methodology	Correspondence courses Number of contact lessons: 360 lessons in total in 4 semesters Forms of trainings: practise oriented theoretical training, trainings, school and maintainer practise

280. The successfulness of leader training programmes, their effect is not measured nationally. Both institutes try to canalize the opinions of their students regarding the training programmes, which results are used in the development of the content and methodology of trainings. BME measures the

work of the consultants, the usefulness of trainings and the general satisfaction regarding training programmes by questionnaires. HUNSEM made a survey in 2003, about the general satisfaction among students from 1997-2002, about the usefulness of taught knowledge, methodology, courses, and exam expectations. Even more, HUNSEM, with the help of those years' students, continuously assesses the work of teachers. More about this, in subchapter 6.4.

281. Beyond post-graduate management training programme there are other, short-term programmes, which do not close with a diploma, but offer, within 30-60 lessons courses, leadership knowledge. BME, in 2005-2006, announced several programmes like the above mentioned, which aims are to offer knowledge on a narrower organizational or management area. The elaborated in-service professional development's subjects are school marketing, preparation for the principal application, deepening the leadership knowledge.

6.2.3. Assuring the quality of leader training programmes

282. The content of training programmes is very much detailed by the relevant legislation, which validation is assured by the accreditation process. The relevant training content for the public education leader training programmes are results of harmonization between institutes. In case of training programmes (post-graduate professional examination) that result in diploma, *higher education accreditation*; in case of training programmes that give no diploma, *in-service teacher training accreditation* guarantees the quality of programmes. The significance of accreditation, besides guaranteeing the quality, is that the 120 lessons every 7 years prescribed by the law for teachers, can be accomplished by attending accredited programmes. (Polinszky, 2006).

283. The logic of accreditation procedure is similar, in both cases, to higher education and in-service teacher training accreditation, only the participant organization and bodies are different. The accreditation procedure starts with a submission of approval request from the preparatory of the programme. The request has to contain the aim of the programme, target groups, thematic, the formal and content requests, the description of necessary, personal and material conditions for fulfilment and the assumption of engagement to conduct the quality assurance procedure stipulated in the governmental decree.

284. In case of in-service teacher trainings, the request has to be submitted to SULINOVA Agency of Educational Development and In-Service Teacher Training, in case of training programs providing diploma to Hungarian Accreditation Committee (HAC). The accreditation bodies evaluate the quality of training programmes as independent bodies. The In-Service Teacher Training Accreditation Body was established based on the Act on Public Education, has 9 members, out of which 4 members are delegated by the Ministry of Education and Culture, 2 by the National council for Public Education, 1 by the National Minority's Committee, 1 by the Higher Education and Academic Council. The Hungarian Accreditation Committee was established for the assignments stipulated in the Act on Higher Education and has 30 members (since 1st of July 2006, has only 29 members). Different higher education institutes, research institutes and other user institutes suggest the members.

285. To the starter request of the accreditation process, has to be attached different expert's opinions about the training (e.g. in certain cases the opinions of the Minorities' Local Government, in case of special subjects the concerned ministry's opinion). The In-service Teacher Training Accreditation Body or the Hungarian Accreditation Committee recommends the founding request for support or for refusal; for this it prepared an expert opinion about the training programme. Accreditation bodies, first of all, control the extent of elaboration of the content of programmes, the correspondence to the aims and requirements stipulated and the coherence of detailed thematic. The Ministry of Education and Culture gives the founding permission, after the decision of the accreditation bodies. This permission is valid for 5 years.

286. For the announcement of the training programmes, the procurement of the starting permission is also necessary. The organizer of the training can request the issuing of the permission. In this case, the accreditation body controls if the personal and material conditions are assured for the organization and running of the training. The founding and starting permissions can be considered in one process as well, if the maker and the organizer of the training is the same client. About the trainings that have the starting permissions, the Ministry of Education and Culture, twice a year, prepares the so called “in-service training register”.

287. In Hungary, the legislation and the controlling accreditation is supposed to assure the quality of trainings. Another way of quality control is to develop training programmes to identify leadership competencies or to develop standards for leadership performance. In Hungary is not yet formulated the standards for professional expectations for leaders or the definition of leadership competencies (measurement and feedback). For the Hungarian public administration sector is true the fact that it is not quite accepted the use of performance indicators and the performance oriented approach is extraneous. When forming training programmes, most of the institutes rely on classical leadership knowledge, accepted in the special literature.

6.2.4. Financing and motivating of leader training and development

288. It is not required from leaders to continuously develop their competencies and knowledge. For this, there is possibility in the in-service teacher training system, but the participation depends on leader’s individual decisions. In certain cases might happen that maintainer local government stimulate candidates for principal’s position to acquire the necessary knowledge for institute leading; they might even require finishing some kind of leader training programme.

289. The procurement of the special exam and the participation to further development trainings is not free of charge; the state, based on the number of teachers, contributes to the expenses. Originally, this represents 3% of the overall budget for education, but the changes of 1999 of the law made the subject of discussions and every year an amount is given for this purpose. The institutes receive this whole sum in one amount a year and they cannot spend on anything else, and only according to the professional development plan. Theoretically, this gives the possibility to function a demand oriented in-service teacher training system and the selection of the best programme corresponding to local demands. The state’s contribution is only for the participation fee (up to 80%), for other expenses (e.g. travel, accommodation, course books), for the substitution expenses while the participant is away and to remunerate the ones who have passed the post-graduate professional exam successfully (governmental decree 277/1997). On certain cases, the employer covers 100% the training’s expenses.

290. The greatest problem is the continuous decrease of the allocated state funding. Since 1997, the real value of the normative grant significantly decreased. At present (in 2006) this sum is 11700 HUF/person (44,6 Euro), in 2004 was 15000 HUF/person (57,2 Euro), in 1999 21800 HUF/person (83 Euro). A short calculation shows what this sum is sufficient. For a 30 member teaching staff, at present, this sum is 351000 HUF for a year, to support training programmes and other associated expenses, in 7 years 2.4 million HUF. This is the income. In 7 years, all 30 members have to accomplish 120 lessons of training programme. With 30 lessons training programmes, where the average fee is 35000 HUF, one member’s fee for 120 lessons would be 140000 HUF (4 x 30 lessons). In 7 years for all the staff, this would be 4.2 million HUF. This is much more expenditure than income. And this only contains the participatory fees, travel, accommodation, substitution expenses are not included. Were not considered either that the programmes have 350 lessons, not 120, and more expensive. A 2 years programme for a participant, on average, is 360000 HUF.

291. If the post-graduate professional exam successfully taken, the pedagogue has to be included in a higher wage category (teacher with post-graduate professional examination). Accomplishing the 7 years in-service teacher training programme, the 3 years waiting time between wage categories

decrease by one year. Inclusion in the 5-10% higher salary class, stimulates participation, therefore the so called “having the paper” function for accomplishing of the post-graduate exam is strong. The inclusion in a higher salary category often represents a stronger motivation than acquiring the knowledge. This is also true for the public education leader trainings as well.

6.3. Education policy initiatives on the area of leader training and development

292. In education policy we find tools that affect leader training and development both explicit and implicit ways. The changes in legislation since 1996 (e.g. legislation about the requirements of leader training qualification) suggest that education policy recognises the important role of leader training, but is still cautious about it.

293. Development policy is one of the emphasized areas, where numerous leader training and development initiatives had support in previous years, and although these programmes' main aim is not the training and development of leaders, during realisation had significant results. Between 2004-2006, few initiatives, connected to 2 operative programmes of the National Development Plan, started, in which had a significant part the professional development of leaders:

- HEFOP 3.1.2: establishment of Regional Development Centre for School and Kindergarten (TIOK)
- HEFOP 3.2.2 and 4.1.1: establishment of Integrated Regional Vocational Training Centres (TISZK) and improvement of their infrastructural conditions

294. Due to applications, nationally 12 TIOKs and 16 TISZKs were established, which function is based on education institutes, pedagogical institutes and infrastructure developed by maintainers. The major aim of both TIOK and TISZK is to develop and run a network of institutions that would make possible a more rational organization of assignment provisions of these territories, the improvement of performance, the development of the new techniques of governance. The development of network could help the spread of modern education methods and to wisely reduce parallel capacities. During realization of these aims, participants obtain new knowledge and the network functioning offers the possibility of learning from each other.

6.4. Innovations in leader training and professional development

295. In the functioning of the already presented two leader training institutes (BME and HUNSEM) we find some innovative solutions. BME has developed the methodology of distance learning and soon starts a training programme based on e-learning tools. This means that the courses used so far in hard copies, will be also available electronically, and part of consultations will be held with the help of the Internet.

296. In case of HUNSEM, innovations worth mentioning are in 3 areas: the governance structure, evaluation system and the training development system based on competency.

297. The establishment and governance structure of HUNSEM. It is functioning since 1998 and was established within a Dutch-Hungarian professional cooperation. In the continuous professional development, Dutch partners, the University of Amsterdam and the NSO, the Dutch Institute of Education and Leader Development, have an important role. Besides them, Hungarian universities, (University of Science from Pécs and Szeged) and the National Institute for Public Education take part as maintainers in the activities and the development of programmes.

298. HUNSEM's work is aided by the following bodies:

1. Institutional Board (IB): HUNSEM's strategic decision making and governing body. Determines the training, research and development priorities. In its work take part the representatives of the maintainers, the Ministry of Education and Culture, the organizations of the local governments, one representative of the organization of school leaders and one representative of the HUNSEM's tutors.

2. The Programme and Examination Committee (PEC): functioning beside the IB; deals with the assignment and control of quality trainings on strategic level, harmonising the necessities of the target audience with the major development of the programmes.

3. Staff Conference: the forum of teachers' information, communication, feedback of training experiences and further development.

4. Staff Council: continuously develops the training programmes, courses, assessments of the applied education methods; also function as advisory body for the principal. Has active role in the continuous development of trainings and courses.

299. HUNSEM runs a complex assessment system to evaluate its own work. Puts a great emphasis on canalization of students' feedback, regarding the work of teachers, content of training on organization. HUNSEM regularly asks the teachers' opinion in order to improve its organizational and informational work.

300. The development of training programmes is a well working process. The IC decides about development priorities. After this, a development team is established; their assignment is to develop for the identified development needs, a training programme or a course. First, they define the competencies needed to be developed, after they deduce the necessary knowledge and, based on these, they start to develop the contents of trainings.

CONCLUSIONS

301. In Hungary, the development of public education institute leadership is included into the priorities of education policy. Strategic documents and long-term programmes (medium-term public education development strategy of the Ministry of Education, the Hungarian Lifelong Learning (LLL) Strategy, 1st National Development Plan Human Resources Development Operational Programme 2004-2006, The New Hungary Development Plan Social Renewal and Social Infrastructure Operational Programmes 2007-2013) deal with this topic. It would be premature to evaluate the aims of these documents because these overall programmes are already, or they will be applied.

302. In Hungarian education policy, the development of public educational system through its leaders is not a new idea, and before the above mentioned strategies and programmes, steps were taken in this area although the complex way of dealing with the problem was not characteristic. Concrete interventions of the education policy happened on certain part domains (e.g. leader training). In the followings, we summarize the major strengths and weaknesses of education policy, regarding school leading and the draw-up of the possibilities, areas of intervention that could bring changes in public education leadership development in the future.

303. Strengths of education policy regarding school leadership:

- The model of Hungarian public education administration developed in the 90's is strongly decentralised. The extension of the local and institutional responsibility is great, the institutional autonomy is considerably intense regarding the questions of content and form of education. Therefore, the judicial and institutional context assures potentially wide latitude and multifarious opportunities for school leaders, for the introduction of innovations and for the improvement of performance.
- According to the demands of labour market and the conception of lifelong learning, instead of improving subject knowledge, the improvement of competences is of primary importance in public education. In accordance with this approach, education policy introduced new, central, standardized devices evaluating outcomes, for measuring the acquisition of competences (national competence assessment, secondary school-leaving examination) that provide feedback about student (and including school) performance. The application of these kinds of information depends characteristically on school leadership, and assists leaders to make decisions and arrangements regarding the improvement of school performance.
- One of the main aims of the compulsory quality development programmes (of the local government and of the institute) is the comprehensive improvement of the institutes for public education, what depends strongly on the maintainers and on the institute leadership.
- In public education system, several professional innovative initiatives and networks came up characteristically as initially bottom-up processes, and significant expertise accumulated in connection with them. In some cases, the initiatives coming from the bottom are strengthened by top-down development.
- The appliance of market-type mechanisms is widespread within the field of leader training and the requisition of counselling services (competition of providers, the procurer's financial decision).
- In Hungary, the system of teacher's in-service training is built-up widely what provides further opportunities regarding the leaders' training and professional development.

304. The weaknesses of education policy regarding school leadership:

- In the appropriate operation of the decentralised public educational system school leadership has an important role, and in the success of all central and local initiatives the layer of school leadership is of great significance. On the other hand, there aren't proper guaranties which assure that school maintainers appoint the professionally fit school leaders.

- Although the autonomy of some educational institutes is great and the school leaders' responsibility expands to several fields, large part of school leaders cannot take advantage of this latitude in the interest of introducing professional innovations and improving student performance. Amongst others, the financial resources being reduced in many cases, the bounds coming from the legal status of civil servants, additionally the motivational problems coming partly from it, the non-existence of feedback mechanisms of the results of standardized measures, the non-clarified responsibility for student performance and the lack of incentives for performance orientation, furthermore the "spare" appreciation of the leaders of successful schools come forward as restrictive factors. These factors eventuate that school leadership don't mobilize its energies in the interest of the introduction of innovations and the improvement of student performance, but concentrates them in the undisturbed attendance of other ordinary duties.
- The institute maintainers' main expectation towards principals is the adherence of budgetary frames and legal operation. It is hard to find someone amongst maintainers, who would evaluate the quality and professional performance of institutional leadership. In 2003, the fact that the quality management programme became compulsory, aimed at the intensification of the maintainers' professional control, but in practice, there is no local quality evaluating system even in larger cities, so there isn't any feedback about the school leaders' performance.
- Institutional quality management is predestined to support the development of organizational processes maintaining the achievement of school performance. Although the preparation of institutional quality management programmes is legally binding, in itself it didn't prove to be sufficient for raising sensitivity towards quality management. The availability of necessary professional knowledge for individual quality evaluation and self-improvement within school is also essential to achieve it, furthermore the maintainers are also needed to take their professional evaluative duty seriously.
- There is no systematic information gathering of leader training and development programmes, therefore their comparison and evaluation are not possible. This lack of information is problematic even in regards with the further development of leadership training system. There are only a few short-term programmes for the leaders' professional development.

305. The fortification of the leadership dimension is observable within developmental policies regarding public education, and this trend would be worth continued and further developed in the future. The institutional quality evaluation, quality development (see COMENIUS 2000 Public Education Quality Development Programme, Local Quality Management Programme and the Institutional Quality Management Programme) fall under the initiatives worthy of pursuance. It is worth it to fit leadership developmental component into these systems, additionally, to rely on the leaders' determinant role more forcefully during the development. In the The New Hungary Development Plan Social Renewal and Social Infrastructure Operational Programmes concerning the period between 2007 and 2013, the involvement of the school leadership development would be important in the interest of the success of developmental interventions with regard to public education.

306. The improvement of the professional accountability can be one of the basic steps of school system development. The aims of the introduced arrangements (e.g. quality development, competence assessment, secondary school-leaving examination) are suitable, but the system lacks the tools of accountability of execution, professional and financial support. The serious appreciation of the leaders' work and the leaders of successful schools on the part of education policy presumably would increase the attractiveness of school leader position, which is not very great nowadays.

307. In Hungary, one of the most important assignments is to continue the already positive changes that have already begun in the field of training and development. An important step was in 1997, the creation of the requirements for public education leader qualification. In order to develop the leader trainings further, it would be important to map and research the necessary competencies for successful

school leading, furthermore to define the standards orienting the trainings. This can be of great help in the development of training content and the judgement of trainings' successfulness.

308. The challenge is to improve the openness of school leading and in certain cases the readiness of collaboration, the cease of "lonely struggling school principal" typology, that can improve the ability of institute leading's change management. These are necessary because in public education, changes have accelerated (e.g. appearance of new technologies, the necessity of acquiring new teaching and learning paradigms), that require new expectancies from the part of the leadership and lead to a continuous learning and changing. This growingly emphasizes the role of team-leading instead of one-man leading, whilst principals can meet the requirements if they are able to involve the most possible colleagues into the fulfilment of the leadership duties. The leader training programmes preparing for a receptive, cooperative, open for changes leader role, that propose the development of the necessary competencies, can offer a lot help in complying with these challenges. Furthermore, the leader training institutes can support this process, if elaborate professional supportive services (e.g. coaching) continuously available for the practising school leaders studying at them.

309. The cooperative attitude and openness is strengthened by the inspiring of network functioning, which supports communication, experience exchange and the spread of best practices (e.g. micro-regional cooperation, network of self-developing schools). In the strengthening of the professional communication, the self-organizing professional community interested in leader development can play important part (e.g. the leader training conferences were considered this type of forums for ten years).

310. Amongst the weaknesses of education policy regarding leader training, we have already mentioned the deficiencies of the system selecting leaders, which provide no guaranties that assure the school maintainers appoint the professionally fit school leaders. In the future, by all means, it will be worth it to reconsider the system selecting leaders. The finding and development of professionally fit leaders are connected to the fact, that Hungarian institute leaders are mainly pedagogues having professional experience; it is not characteristic of them to gain leadership experience in another sector. Canalizing the leadership experience, during leadership work, from outside the pedagogical sector, it should be encouraged. It can be the tool of opening the institute leadership towards other sectors, for example the fulfilment of the compulsory professional practice in the leader training programmes outside the education branch, or when applying for a leadership position those, who have leadership experience from outside the educational sector, could have an advantage over the others.

311. To deeply understand and to further develop the connection between the successfulness of education and leadership, the canalization and spread of international experiences are needed. This knowledge would contribute to improve the conditions and processes of learning-development and to form an education policy that supports it.

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LIST OF ACRONYMS

BME	Budapesti Műszaki és Gazdaságtudományi Egyetem <i>Budapest University of Technology and Economics</i> http://www.bme.hu
HEFOP	Humán Erőforrás Fejlesztés Operatív Program <i>Human Resources Development Operational Programme</i> http://www.hefop.hu
HUNSEM	Közoktatási Vezetőképző Intézet (KÖVI) <i>Hungarian-Netherlands School of Educational Management</i> http://kovi.oki.hu
IMIP	Intézményi Minőségirányítási Program <i>Institutional Quality Management Programme</i>
KSH	Központi Statisztikai Hivatal <i>Hungarian Central Statistical Office</i> http://www.ksh.hu
KT	Közoktatás-politikai Tanács <i>National Council for Public Education Policy</i>
OKÉV	Országos Közoktatási Értékelési és Vizsgaközpont <i>National Public Education Evaluation and Examination Centre</i> http://www.okev.hu
OKI	Országos Közoktatási Intézet <i>National Institute for Public Education</i> http://www.oki.hu
OKJ	Országos Képzési Jegyzék <i>National Training Register</i>
OKNT	Országos Köznevelési Tanács <i>National Council for Public Education</i>
OM / OKM	Oktatási Minisztérium, 2006 júliusától Oktatási és Kulturális Minisztérium <i>Ministry of Education</i> <i>From July 2006: Ministry of Education and Culture</i> http://www.okm.gov.hu
OPEK	Oktatáspolitikai Elemző Központ <i>Centre for Educational Policy Analysis</i> http://www.sulinova.hu
ÖMIP	Önkormányzati Minőségirányítási Program <i>Municipal Quality Management Programme</i>
MAG	Megelőzés – alkalmazkodás – gondoskodás program <i>Prevention–accommodation–care programme</i>

NAT	Nemzeti Alaptanterv <i>National Core Curriculum</i>
NFT	Nemzeti Fejlesztési Terv <i>National Development Plan</i> http://www.nfu.gov.hu
RFOP	Regionális Fejlesztési Operatív Program <i>Regional Development Operational Programme</i> http://www.nfu.gov.hu
Sulinova Kht.	Sulinova Közoktatás-fejlesztési és Pedagógus-továbbképzési Kht. <i>Agency for Educational Development and In-service Teacher Training</i> http://www.sulinova.hu
TÁMOP	Társadalmi Megújulás Operatív Program <i>Social Renewal Operative Programme</i> http://www.nfu.gov.hu
TIOK	Térségi Iskola- és Óvodafejlesztő Központok <i>Regional Centre for School and Kindergartens Development</i>
TIOP	Társadalmi Infrastruktúra Operatív Program <i>Social Infrastructure Operative Programme</i> http://www.nfu.gov.hu
TISZK	Térségi Integrált Szakképző Központok <i>Regional Integrated Centre for Vocational Training</i>
ÚMFT	Új Magyarország Fejlesztési Terv <i>New Hungary Development Plan</i> http://www.nfu.gov.hu

ANNEXES

Annex 1: Statistics for chapters 1-2

Table 1.1

Minorities in Hungary

	The number of those, who assumed belonging to a minority	
	1990.	2001.
Roma	142 683	190 046
German	30 824	62 233
Slovak	10 459	17 692
Croat	13 570	15 620
Romanian	10 740	7 995
Ucranian	n.a.	5 070
Serb	2 905	3 816
Slovenian	1 930	3 040
Polish	n.a.	2 962
Greek	n.a.	2 509
Bulgarian	n.a.	1 358
Ruthenian	n.a.	1 098
Armenian	n.a.	620

Source: KSH 2001 census.

Table 1.2

A) Number of live birth between 1990 and 2004 (capita)

1990	1993	1996	1999	2001	2004
125.679	117.033	105.272	94.645	97.047	95.137

Source: Hungarian Public Health Database on the Internet, IMEA, www.eski.hu

B) Number of school age groups between 200 and 2006 (thousand capita)

Year	6–9 year	10–13 year	14–17 year
2000	478	489	497
2002	450	489	494
2004	417	478	488
2006	396	449	489

Source: Calculations of András Sugár based on ratio of birth, its trends and ratio of death

Table 1.3

Demographical distribution based on age groups and sexes (%)

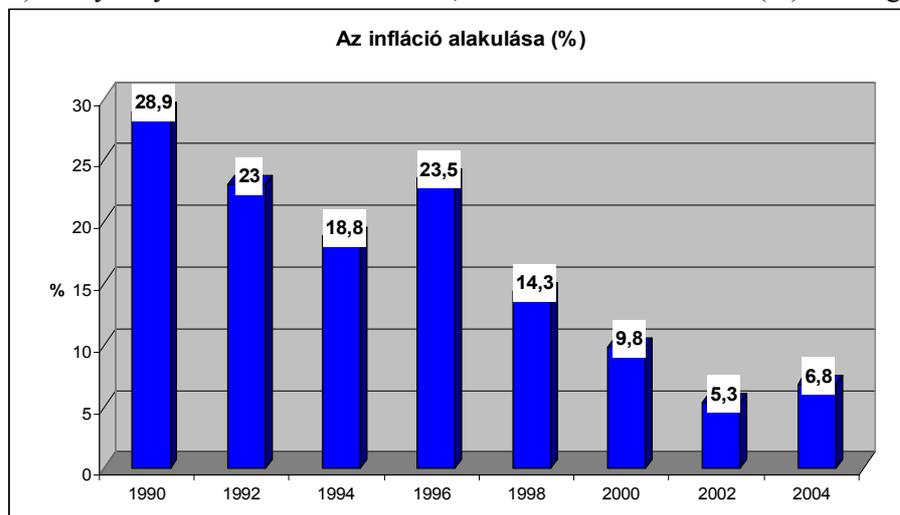
Year	0–14	15–39	40–59	60–x	
	Years old ratio, %				
1990	20,5	35,5	25,0	18,9	100
1995	18,3	35,8	26,5	19,4	100
1996	18,0	35,6	27,0	19,4	100
1997	17,7	35,4	27,4	19,5	100
1998	17,5	35,3	27,7	19,5	100
2001	16,8	35,0	28,0	20,2	100
From which, in 2001:					

Man	18,0	37,2	28,2	16,6	100
Woman	15,8	32,9	27,7	23,6	100

Source: KSH

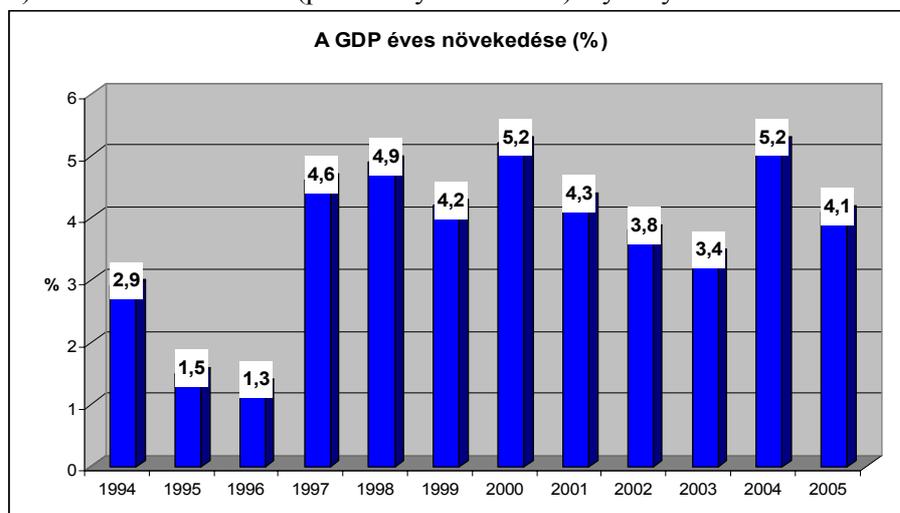
Figure 1.1

A) The yearly cadence of the inflation, between 1990 and 2004 (%) – changes in the inflation (%)



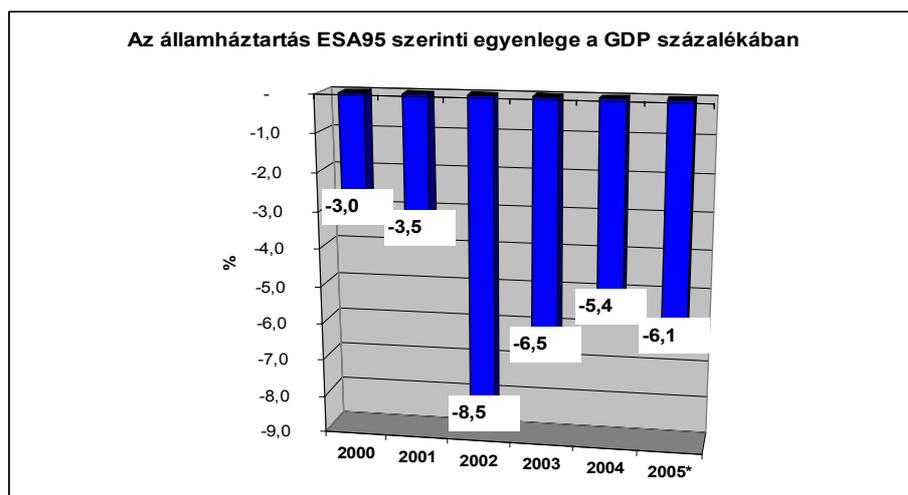
Source: KSH, 2006

B) GDP's volume index (previous year's 100 %) – yearly increase of the GDP (%)



Source: KSH, 2006

C) Changes in the deficiency of the state budget – the budget's balance in the % of the GDP, according to ESA95



Source: Ecostat

Table 1.4

A) Changes in expenses for the education from the GDP, concerning educational levels, 1990-2001 (%)

Nomination	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Kindergarten	0,74	0,79	0,84	0,87	0,88	0,77	0,72	0,76	0,74	0,76	0,71	0,71
First grade education	2,38	2,57	2,69	2,62	2,56	2,13	1,93	3,00	2,90	2,88	2,71	2,76
Secondary education	1,47	1,57	1,73	1,66	1,54	1,31	1,20					
Public education expenses in total	4,59	4,93	5,26	5,15	4,98	4,21	3,85	3,76	3,64	3,64	3,42	3,47
Higher education	0,81	0,88	1,06	1,07	1,08	0,96	0,86	0,94	0,90	0,96	1,09	1,04
Child protection	0,21	0,21	0,20	-	-	-	-	-	-	-	-	-
Other education	0,28	0,32	0,28	0,32	0,34	0,29	0,27	0,28	0,29	0,20	0,21	0,20
Other, education related, expenses								0,11	0,11	0,33	0,40	0,47
Education expenses in total	5,89	6,34	6,80	6,54	6,40	5,46	4,98	4,98	4,83	5,18	5,12	5,18
Education expenses in the % of state budget	9,56	9,62	9,64	8,91	8,36	8,56	8,66	10,0	9,75	n.a.	n.a.	n.a.

Source: OM adatközlése

B) State budget expenses in the % of the GDP, in functional dissociation

	2000	2001	2002	2003
General public utility	5,3	5,5	5,0	4,0
Protection	1,2	1,3	1,4	1,3
Order protection	2,0	2,1	2,2	1,7
Economical functions	5,9	6,1	10,3	5,4
Environmental protection	0,8	1,0	1,0	0,7
Habitation policy	1,5	1,4	1,7	1,3
Public health	4,6	4,6	4,8	4,9
Culture	1,4	1,5	1,7	1,5

Education	5,7	5,9	6,2	5,8
Social protection	14,7	14,7	15,5	15,3
Debt handling	5,6	4,8	4,0	4,3
Total	47,9	48,1	53,3	46,1

Source: Benedek et al. 2004

Table 1.5

Public education support between 2004-2006 within the OP Human Resources, million HUF

OP/setting of objectives	Pay offs by the end of 2005			
OPHRD	Adjudged support	Engrossed in contract	Domestic source	Together
2.1. Assuring equal chances for the disadvantaged pupils	4 609,4	4 595,1	229,2	1 281,2
3.1. Development of skill and competencies needed for lifelong learning	8 964,0	10 154,0	597,2	2 682,1
3.2. The vocational training's content, methodology and structural development	10 841,4	8 412,6	420,3	3 014,5
4.1. Development of educational and training infrastructure	11 437,5	11 437,5	35,6	177,8

Source: based on data from the FMM of OP Human Resources Development and the EQUAL Programme Leading Authority, calculations of Anna Probald

Table 1.6

Sources available from OP Regional Development for public education 2004-2006 million HUF

OPRD	Total available sources	Domestic source	EU source
2.3. Infrastructural development of kindergartens, first grade education institutes	13 785,3	2 191,1	11 595,1

Source: based on data from the FMM of OP Human Resources Development and the EQUAL Programme Leading Authority, calculations of Anna Probald

Table 2.1

Distribution of employees in public education based on occupation groups (1992-2001)

Occupation group	1992	1997	1999	2000	2001
Leader	2,60	8,68	8,69	9,67	8,7
Occupation that requires higher education studies	5,02	6,62	5,78	7,13	6,0
Office positions	5,16	2,46	2,34	2,47	2,3
Service positions	4,15	9,26	9,37	8,91	9,1
Cleaners, guards	15,84	15,20	15,5	14,61	14,7
Specialized pedagogues	64,25	52,51	54,28	53,86	55,7
Other pedagogues	2,98	5,27	4,04	3,35	3,5
Together	100	100	100	100	100

Source: data based on the wage tariffs of National Labour force Centre (Varga,2002)

Table 2.2

Basic data of general school education *, between 1960/61, 1970/71, 1980/81, 1990/91, 2004/05

Semester	Places for assignment supply	for Pupil	Full time pedagogue	Class	Classroom	Fresh year
1960/61	6395	1408535	58672	47717	31033	234888
1970/71	5602	1144070	65892	44877	33052	144424
1980/81	3799	1197777	80701	47721	37724	176536
1990/91	3723	1166076	96791	52675	49842	129920
1991/92	3820	1112374	95559	52254	50405	131524
1992/93	3901	1071727	94980	51932	50979	135349
1993/94	3962	1032025	95753	51020	51364	131497
1994/95	4010	1001709	96141	50578	51957	132031
1995/96	4006	987561	93035	49178	51892	130230
1996/97	3965	976423	89792	48184	51533	130689
1997/98	3952	973401	89238	48119	51944	133366
1998/99	3931	973326	89570	48314	52489	131763
1999/00	3897	969755	89424	47813	52526	127274
2000/01***	3875	957850	89750	47845	43500	122580
2001/02	3852	944244	90294	47865	43195	117648
2002/03	3793	930386	89035	46723	42603	117184
2003/04	3748	909769	89784	46006	42051	108447
2004/05	3690	887785	87116	45057	41581	104757

Source: Ministry of Education's statistical handout, First grade education 1999/2000; Ministry of Education's statistical handout, Educational yearbook 2004/2005
 * Remark: Together with general remedial education school training. The number of pupils and fresh year pupils refers to daily school. The number of pedagogues, classes and classrooms contains both the daily school and adult education (data available by types for places for assignment supply). Until 1999/00-ig data of classrooms and special classrooms are together, from 2000/01 only classrooms.

* Data regarding years 2000/2001. Were based on a 98% survey and were forecasted based on the trend by the Ministry of Education.

Table 2.3
Formation of specifics in the general schools*, between 1990/91 and 2002/03

Year	Number of pupils/one school	Per one classroom	Per one class	Per one pedagogue	Number of classes/one classroom	Per one pedagogue without employees from the daycares
1960/61	220,3	45,4	29,5	24,0	1,5	n.a.
1970/71	204,2	34,6	25,5	17,4	1,4	n.a.
1980/81	315,3	31,8	25,1	14,8	1,3	n.a.
1990/91	313,2	23,4	22,4	12,0	1,1	15,3
1991/92	291,2	22,1	21,3	11,6	1,0	14,8
1992/93	274,7	21,0	20,6	11,3	1,0	14,2
1993/94	260,5	20,1	20,2	10,8	0,9	13,5
1994/95	249,8	19,3	19,8	10,4	0,9	13,1
1995/96	246,5	19,0	20,1	10,6	0,9	13,2
1996/67	246,3	18,9	20,3	10,9	0,9	13,5
1997/98	246,3	18,7	20,2	10,9	0,9	13,6
1998/99	247,6	18,5	20,1	10,9	0,9	13,6
1999/00	248,8	18,5	20,3	10,8	0,9	13,6
2000/01*	247,2	22,0	20,0	10,7	1,1	n.a.
2001/02	245,1	21,9	19,8	10,5	1,1	n.a.
2002/03	245,3	21,8	19,9	10,4	1,1	n.a.
2003/04	242,7	21,6	19,8	10,1	1,1	11,9
2004/05	240,6	21,3	19,7	10,2	1,1	11,9

Source: calculations by Erika Garami, based on Ministry of Education's statistical handout, First grade education 1999/2000; Ministry of Education's statistical handout, Education yearbook 2004/2005

* Data regarding years 2000/2001. Were based on a 98% survey and were forecasted based on the trend by the Ministry of Education.

* *Remark:* Together with general remedial education school training. Under school is understood the place where assignments are solved. The number of pupils and fresh year pupils refers to daily school; the number of pedagogues, classes and classrooms contains both the daily school and adult education (data available by types for places for assignment supply)

Table 2.4.
Number, ratio of general schools, pupils, pedagogues based on supporters, 2004/05

Nominations	Institute	Institute, %	Place of assignment solving	Place of assignment solving %	Pupil, capita	Pupil, %	Pedagogue, capita	Pedagogue, %	pupil/pedagogue
Local settlement government	2792	84,8	3151	85,4	778585	87,4	74194	85,2	10,5
Local county government	182	5,5	203	5,5	38647	4,3	5073	5,8	7,6

Nominations	Institute	Institute, %	Place assignment solving	ofPlace assignment solving	of Pupil, capita	Pupil, %	Pedagogue, capita	Pedagogue, %	pupil/ pedagogue
Central budget	54	1,6	55	1,5	20189	2,3	2022	2,3	0,0
Church Foundation, private person	165 70	5,0 2,1	174 71	4,7 1,9	39811 8769	4,5 1,0	4225 1162	4,8 1,3	9,4 7,5
Other	30	0,9	36	1,0	4550	0,5	440	0,5	10,3
Total	3293	100,0	3690	100,0	890551	100,0	87116	100,0	10,2

Source: Ministry of Education's statistical handout, Education yearbook 2004/2005

Table

2.5

The change of number of those who study in secondary education/programme, 1985/86–2002/03

Year	Grammar school	Grammar with low school	school Vocational grammar secondary school	Vocational school**	Total (with low grammar school)
1985/86	105 794	105 794	130 155	189 622	425 571
1986/87	105 194	105 194	131 517	188 251	424 962
1987/88	105 976	105 976	133 618	189 983	429 577
1988/89	108 440	108 440	139 740	199 784	447 964
1989/90	116 317	116 317	157 075	215 027	488 419
1990/91	123 425	123 425	168 352	222 835	514 612
1991/92	130 378	134 139	178 911	222 382	535 432
1992/93	136 729	143 805	186 183	212 293	542 281
1993/94	138 198	150 163	192 388	199 203	541 754
1994/95	140 352	158 957	196 965	185 975	541 897
1995/96	140 884	164 203	208 415	172 599	545 217
1996/97	140 867	166 989	220 528	158 361	545 878
1997/98	141 402	169 107	227 243	143 911	540 261
1998/99	142 196	171 769	234 430	128 203	534 402
1999/00	145 210	175 492	241 369	117 038	533 899
2000/01*	149 500	178 500	239 300	120 330	538 130
2001/02	154 383	182 267	238 622	123 951	544 840
2002/03	158 664	186 508	239 793	123 341	549 642
2003/04	162216	190447	247622	123457	561526
2004/05	165182	193366	245302	123403	562071

Source: calculations by Erika Garami, based on the Ministry of Education's statistical handout, Secondary education 1999/2000; Ministry of Education's statistical handout, Education yearbook 2001/2002, Ministry of Education's statistical handout, Education yearbook 2004/2005 Data regarding years 2000/2001, were based on a 98% survey and were forecasted based on the trend by the Ministry of Education.

** Vocational school data is understood without special school data.

Table **2.6**
Full time pedagogues in secondary education/programme *, between 1960/61, 1970/71, 1980/81, 1990/91, 2004/05

Year	Vocational school	Special school	vocational Grammar school	Vocational school	secondary	Total
1960/1961	3 738	..	5 750	3 028		12 516
1970/1971	8 673	..	7 196	6 246		22 115
1980/1981	12 206	..	6 639	8 821		27 666
1990/1991	11 287	127	10 246	12 656		34 216
1991/92	12 683	239	10 732	13 285		36 939
1992/93	12 506	260	11 290	13 983		38 039
1993/94	12 509	361	11 959	14 862		39 691
1994/95	12 266	410	12 578	15 358		40 612
1995/96	11 399	439	12 912	15 772		40 522
1996/97	10 164	490	13 133	16 329		40 116
1997/98	9 339	476	13 669	17 096		40 580
1998/99	8 777	462	14 021	17 831		41 091
1999/00	8 350	468	14 415	18 430		41 663
2000/01**	8 150	575	15 550	18 950		43 225
2001/02	7 982	801	16 845	19 450		45 078
2002/03	8 425	880	17 128	19 955		46 388
2003/04	8 647	1 069	17 675	20 804		48 195
2004/05	8 577	1 113	17 816	20 756		48 262

Source: Ministry of Education's statistical handout, Education yearbook 2001/2002, Education data 2002/2003, KSH; Ministry of Education's statistical handout, Education yearbook 2004/2005
* The time frame set by the Ministry of Education pedagogues working in daily and adult education are counted together.

* Data regarding years 2000/2001, were based on a 98% survey and were forecasted based on the trend by the Ministry of Education.
Remark: In the vocational school, until 2000, data of skilled labour workers, shorthand typist, remedial workers and other vocational schools, are together.

Table 2.7

Change of numbers of pedagogues and pupils/school types (daily school, without adult teaching) between 1990/91 and 2001/02 (1990/91 = 100%)

Institution type	Number of pedagogues	Number of pupils
Kindergarten	96,1	87,5
General school	93,3	81,0
High school	158,5	144,2
Vocational training	61,8	55,8
total	100,4	88,4

Source: calculations of Erika Garami, based on educational statistics of the Ministry of Education

Table **2.8**
The number of those who successfully accomplished the 8th year in daily school and the ratio of further learners, between 1985/86–1999/00 and 2001/02-2004/05

Year**	No. of those who finished the 8 th year (capita)	Grammar school (%)	Vocational secondary school (%)	Vocational school (%)	Shorthand typing school (%)	Remedial vocational school (%)	Special vocational schools for healthy (%)	Total of further learners (%)
1985/86	130992	20,8	26,0	43,8	1,4	1,4	–	93,6
1986/87	131219	20,7	27,0	43,5	1,7	1,3	–	94,2
1987/88	134223	21,1	26,7	44,2	1,4	1,4	–	94,8
1988/89	149640	20,1	27,4	44,5	1,6	1,4	–	95,0
1989/90	170891	20,4	27,0	42,7	1,7	1,5	–	93,3
1990/91	164616	21,1	27,5	42,0	1,6	1,3	n. a.	93,4
1991/92	158912	21,6	28,9	39,2	1,3	0,9	n. a.	91,9
1992/93	151295	23,3	30,1	36,6	1,0	0,8	3,9	95,7
1993/94	144203	24,2	31,8	35,5	0,9	0,6	4,5	97,5
1994/95	136900	25,7	32,6	35,2	5,3			98,8
1995/96	122359	27,1	33,7	34,2	4,3			99,3
1996/97	120561	27,2	34,4	31,9	3,6			97,1
1997/98	116711	29,0	35,5	30,8	2,6			97,9
1998/99	113654	30,7	38,0	24,6	2,5			95,8
1999/00	114302	31,6	39,0	22,9	2,4			95,9
2000/01***	121100	n.a.	n.a.	n.a.	n.a.			n.a.
2001/02	118200	33,0	43,0	24,0	–			–
2002/03	118038	34,0	43,0	23,0	–			–
2003/04	115863	33,0	44,0	23,0	–			–
2004/05	117093	34,0	43,0	23,0	–			–

Source: Ministry of Education's statistical handout, secondary education 1999/2000; Educational statistical yearbook of the Ministry's of Education 2004/05

* In the number of those who successfully finished the 8th year are included, since the beginning of 1990, the number of 8th grade pupils from the 6/8 years grammar schools.

** Before 1990, data did not contain the data of remedial vocational schools. Since then, yes.

*** Data regarding years 2000/2001, were based on a 98% survey and were forecasted based on the trend by the Ministry of Education. Data of special vocational schools are contained from this year by the vocational school's data.

Table 2.9.

Number of secondary education pupils / one class / one pedagogue / programme, between 1980/81 and 2004/05

Year	grammar school pupil / class	Vocational secondary school pupil / class	Skilled labour, vocational school pupil / class	force school pupil / class	Shorthand typing school pupil / class	Remedial vocational school pupil / class	Special vocational schools for healthy ** pupil / class	National ratio(only for secondary education schools) pupil / class
1960/6	34,8	18,7	34,4	15,7	-	35,0	-	-

Year	grammar school	Vocational secondary school		Skilled labour, vocational school		force	Shorthand typing school	Remedial vocational school		Special vocational schools for healthy **			National ratio(only for secondary education schools)	
	pupil / class	pupil / class	pupil./ class.	pupil./ class.	pupil./ class.	pupil./ class.	pupil / class	pupil / class	pupil./ class..	pupil / class.	pupil. / class.	pupil / class.	pupil. / class.	pupil. / class.
1970/7														
1	33,2	17,5	34,2	17,2	29,6	26,3	-	-	-	-	-	-	-	-
1980/8														
1	30,5	13,5	31,0	12,9	28,0	14,4	-	-	-	-	-	-	-	-
1985/8													30,0	14,2
6	31,8	13,4	31,7	13,0	28,0	15,3	28,1	32,8	34,3	14,3				
1986/8													29,7	13,8
7	31,1	12,7	31,4	12,8	27,8	15,1	28,2	30,6	33,4	13,8	-	-		
1987/8													29,2	13,6
8	30,6	12,6	31,0	12,7	27,8	15,2	27,6	28,6	33,4	13,4	-	-		
1988/8													29,4	13,8
9	30,4	11,9	31,0	12,7	28,5	15,9	27,6	25,5	33,4	13,0	-	-		
1989/9													29,8	14,2
0	30,7	12,0	31,2	13,3	29,2	16,7	28,1	22,4	34,2	13,0	-	-		
1990/9											29,7	n.a.	29,8	14,4
1	30,9	12,0	30,9	13,3	29,1	17,4	28,3	28,2	33,4	13,2				
1991/9											25,5	23,2	29,5	14,5
2	31,0	12,1	30,5	13,5	29,1	17,4	26,9	25,1	32,1	14,2				
1992/9											24,3	28,3	29,4	14,2
3	31,0	12,1	30,0	13,3	28,4	16,5	26,6	23,7	31,1	14,0				
1993/9											23,2	22,8	29,1	13,5
4	30,9	11,6	29,6	12,9	28,2	15,5	26,7	20,2	31,5	13,0				
1994/9											22,0	18,8	28,8	13,0
5	30,7	11,2	29,0	12,8	28,0	14,9	24,1	19,7	28,6	11,7				
1995/9											21,7	17,6	28,6	13,0
6	30,2	10,9	28,6	13,2	28,1	15,0	23,4	16,7	28,5	11,2				
1996/9											21,8	16,5	28,5	13,1
7	29,7	10,7	28,6	13,5	28,3	15,6	23,1	14,8	26,0	9,8				
1997/9											19,5	16,1	28,1	12,9
8	29,1	10,5	28,3	13,5	27,8	15,4	22,9	16,3	23,4	16,1				
1998/9											21,3	15,2	28,0	12,6
9	28,7	10,3	28,1	13,3	27,6	14,6	24,7	13,9	23,0	15,3				
1999/0											20,8	17,2	27,8	12,4
0	28,7	10,3	27,8	13,3	27,3	13,8	25,0	20,3	23,4	16,4				
2000/0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1*														
2001/0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
2														
2002/0														
3	29,0	11,5	27,0	13,2	26,3	15,0	-	-	-	-	12,5	8,2	27,1	12,8
2003/0														
4	29,0	11,5	26,5	12,7	26,1	14,8	-	-	-	-	12,8	17,7	26,8	12,7

Year	grammar school	Vocational secondary school	Skilled labour, vocational	force Shorthand typing school	Remedial vocational school	Special vocational schools healthy **	National ratio(only for secondary education schools)							
	pupil / class	pupil / class	pupil / class	pupil / class	pupil / class	pupil / class	pupil / class							
2004/05	28,9	12,0	26,2	13,2	25,5	15,3	-	-	-	-	12,7	8,5	26,5	13,1

Source: calculations by Erika Garami, based on the Education statistics of the Ministry of Education; Report.... 2000; Ministry of Education's statistical handout, Educational yearbook 1999, database of the years 2002/03 and 2004/05 of the Ministry of Education.

Table 2.10

The distribution of financial support from the central budget for local governments, based on the form of support 199-2004 %

Year	Normative consent (1.)	From consent Basic consent (2.)	normative Supplementary consent (3.)	Bounded normative consent (4.)	Support central finance policy measures (5.)	for Centralized budget (6.)	Together (1)+(4)+(5)+(6)
2001	95,1	81,0	14,1	4,8	0,0	0,1	100,0
2002	85,4	73,2	12,2	3,8	10,7	0,1	100,0
2003	95,4	84,3	11,0	4,5	0,0	0,1	100,0
2004	96,4	82,3	14,0	3,5	0,0	0,1	100,0

Local and central governments' financial institutes' reports, legislation regarding the execution of the budget, based on data collection of Éva Borbás and the calculations of Júlia Varga.

Table 2.11.

Expenses of state (local government) institutes with the budget support of private institutes in the % of the GDP 2001-2004

Year	State institutes	Together with the budget support of private institutes
2000	3,41	3,64
2001	3,48	3,73
2002	3,79	4,05
2003	4,17	4,53
2004	3,93	4,27

Source: Local and central governments' financial institutes' reports, legislation regarding the execution of the budget, based on data collection of Éva Borbás and the calculations of Júlia Varga.

Table 2.12.

State supported institute's public education expenses and the expenses for support of private institute's public education expenses 2001-2004, million HUF

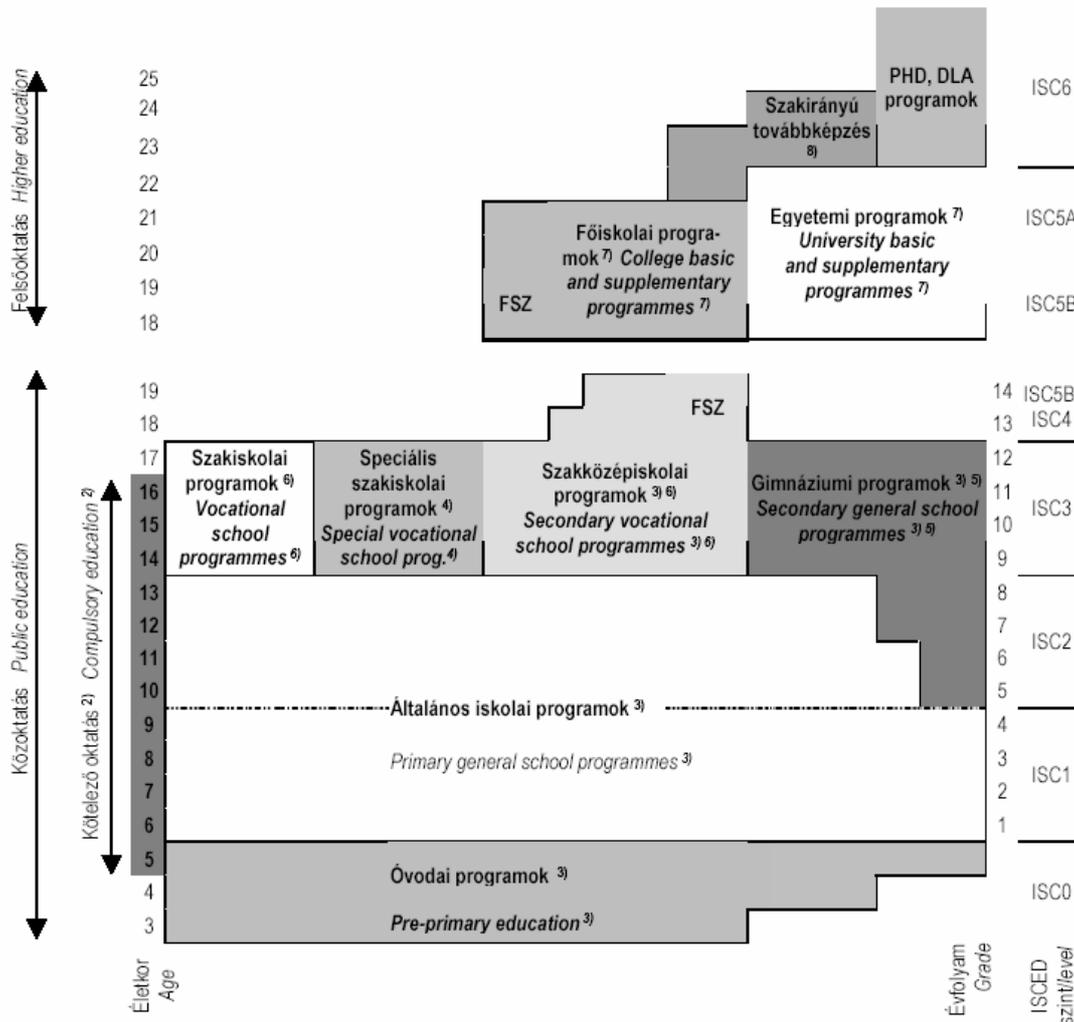
Year	State institutes	Central budget support for private institutes ¹	With the support of private institutes
2000	449290	29976	479266
2001	516122	38169	554291
2002	633660	43854	677514
2003	775615	70961	846576
2004	794743	77385	872128

¹Without the support of private institute's foundations. See more detailed table 3...

Source: Local and central governments' financial institutes' reports, legislation regarding the execution of the budget, based on calculations of Júlia Varga.

Annex 2: The structure of Hungarian public education and higher education system

Az iskolarendszerü köz- és felsőoktatás szerkezete életkor, évfolyam és ISCED szint szerint ¹⁾
The Structure of the Hungarian Public Education and Higher Education System by age, grade and by ISCED level ¹⁾



- 1) Az egyes programoknál az életkort és a tipikus képzési időt a nappali képzésre vonatkozóan jelöltük – The figure shows the typical age and typical length of programmes in full-time education.
- 2) Kötelező oktatás időszaka: 1998/99-es tanévtől tanulmányaikat kezdők esetén 18 éves korig tart – From 1998/99 academic year the compulsory education lasts until age of 18 years.
- 3) Óvodai, általános iskola, gimnáziumi és szakközépiskolai programok magukban foglalják a gyógypedagógiai tanterv szerinti nevelést oktatást is. – Pre-primary, primary general, secondary general and secondary vocational school programmes includes also the programmes for pupils with special educational needs.
- 4) Speciális szakiskolai programok: gyógypedagógiai tanterv szerinti szakiskolai oktatást jelent, ISCED 2 szinten, érettségéhez nem kötött szakképzési programokat tartalmaz. – Special vocational programmes mean vocational school programmes delivered to students with special educational needs at ISCED 2 level, vocational programmes contain programmes without requirement of maturity examinations.
- 5) Gimnáziumi programok: 4(5), 6, illetve 8 évfolyamos programokat foglalja magában. – Secondary general school programmes include the programmes with 4 (5), 6 and 8 grades.
- 6) Szakiskolai, szakközépiskolai programok: érettségéhez nem kötött, érettségéhez kötött, illetve a felsőfokú szakképzési (FSZ) programokat foglalják magukban – Vocational and secondary vocational school programmes contain programmes with requirement and without requirement of maturity examination and accredited post-secondary vocational programmes.
- 7) Főiskolai, egyetemi programok: alap és kiegészítő alapképzés programjai. – College and university basic and supplementary programmes.
- 8) Szakirányú továbbképzés: főiskolai vagy egyetemi alapképzésben megszerzett végzettségre és meghatározott szakképzettségre épülő képzés ISCED 5A szinten, amely újabb végzettséget nem, de speciális szakirányú szakképzettséget ad. – Postgraduate specialisation programmes: programmes in ISCED 5A level with requirement of graduation in college or university and with requirement of special attainments. These programmes do not give a higher attainment level, but give a special qualification.

Annex 3.: Interviewees for the national study

Interviewees	Time
Bajzák, Eszter, principal of the Catholic Institute of Organizational and In-service Training	18 th May 2006.
Balázs, Péter Pálné, director of Budapest's 10 th district local government's educational department	23 rd May 2006
Baráth, Tibor, director of HUNSEM	18 th May 2006.
Bosch, Márta, TEU's public education leader special training department	24 th May 2006.
Brassói, Sándor, assistant director of Ministry of Education's head department	18 th May 2006.
Halász, Gábor, general director of National Institute for Public Education	16 th May 2006.
Horn, György, principal of Alternative Economic Grammar School	18 th May 2006.
Setényi, János, manager of Expanzió Human Consulting Ltd	12 th May 2006.