

EQUITY IN EDUCATION THEMATIC REVIEW

COUNTRY ANALYTICAL REPORT

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Equity in Education: Dimensions, Causes and Policy Responses

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INTRODUCTION

1. This report was prepared by Sulinova's Center for Educational Policy Analysis¹ commissioned by the Ministry of Education within the framework of the OECD's "Equity in education: dimensions, causes and policy responses" program. The aim of the report is to support the debate of educational policies in Hungary, to support the members of the OECD expert group exploring the problems of equity in education in Hungary and to contribute to the completion of an international comparative analysis.

2. According to all these, in the course of the development of this report the maintenance of two conditions had to be ensured: (i) for the sake of international comparison, this report had to be completed with regard to the conceptual and structural framework worked out by the experts of countries participating in the OECD program, and at the same time (ii) it had to create a picture of the relative importance of the problems of equity in Hungary and the specialities of the policy answers given to these problems. This duality has resulted in the fact that at some points we had to diverge from the thematic frameworks serving as the basis of national reports.

3. No research could be carried out in order to create this report; it was not even the target of this program. Thus, this report has been completed by summarising the knowledge given by the available Hungarian information and research background. The main resources of the report are (i) the "Report on Hungarian Public Education" published by the National Institute for Public Education every three years, and its background studies, (ii) the public reports and strategic plans completed by the Center for Educational Policy Analysis and the (iii) expert background papers commissioned within the framework of the program. Moreover, a wide range of background research material and documents of educational policy was processed in connection with certain thematic parts of the report.

¹ The report was completed by Péter Radó with the contribution of: Dániel Horn, Georgina Kasza, Judit Keller and, Judit Lannert

CHAPTER 1. THE COUNTRY'S CONTEXT AND CURRENT EQUITY SITUATION

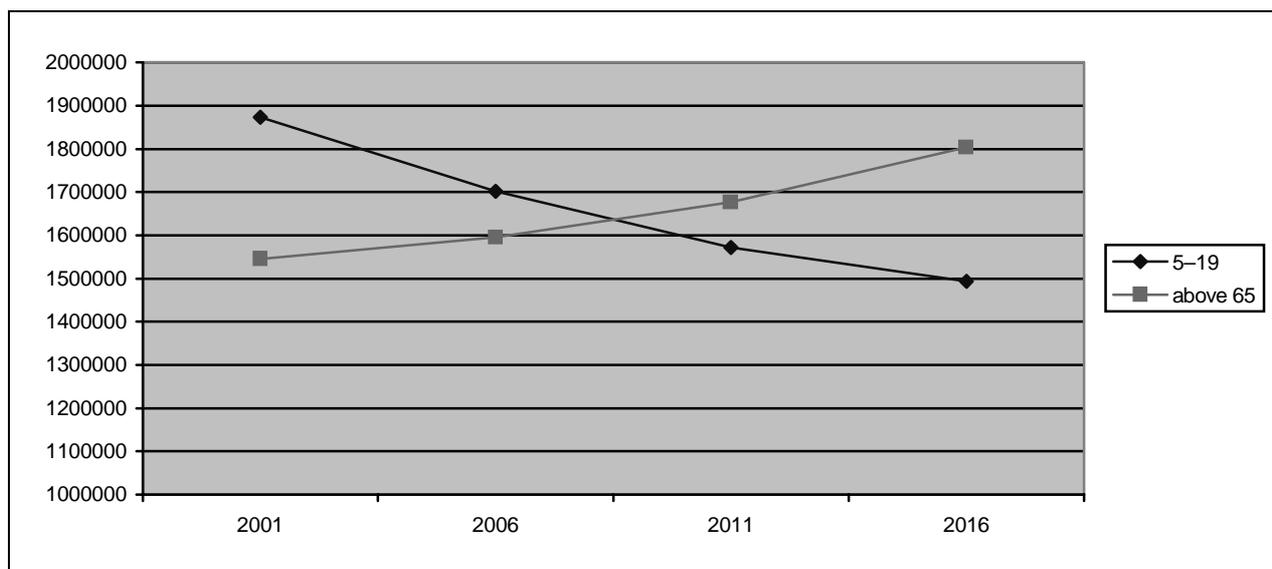
1.1. Background: the socio-economic environment of education in Hungary

1.1.1 The decrease of population, aging, low rate of migration

4. The non favourable tendencies of the 1980s in the number of population continued during the 1990s in Hungary. As a result of this, age groups enrolled into the education system decreased from the 123,000 in 1990 to 94,000 in 1999. Since 2000 the decrease of population has slowed down. Long-term prognosis, based on tendencies of the last few decades, suggest further decrease of population in Hungary. The common element in different prognosis is that the population of Hungary is expected to fall under 10 million by 2010. The decrease of population is mainly affected by decrease in fertility. This tendency is generally explained by the fact that families bear on fewer children and women give birth later. The currently high rate of deaths is also expected to decrease, and it is hoped that presently active age groups will be able to adapt to socio-economic conditions after two decades of shocking economic and political changes in Hungary. However, this will not be enough to stop the natural decrease of the Hungarian population. It is only the positive impact of future migration that can slow this tendency.

5. This also has an effect on the population's age structure. The changes directly affecting public education is the decrease in the number of younger age groups. The 23.6% rate of the 0-19 age group in year 2001 is expected to fall –according to the different condition assumed - to 19-23%. This means that, considering the optimistic version, the number of the 5-19 age group will decrease by 208,000 until 2016 (there will be 12% less young people). The decrease of the number of active population and aging directly affect the amount of public spending, since the lower number of taxpayers and other targets will create a more difficult situation for education.

Figure 1.1. The expected changes of the number of population between 5-19 and above 65 in Hungary, 2001-2016

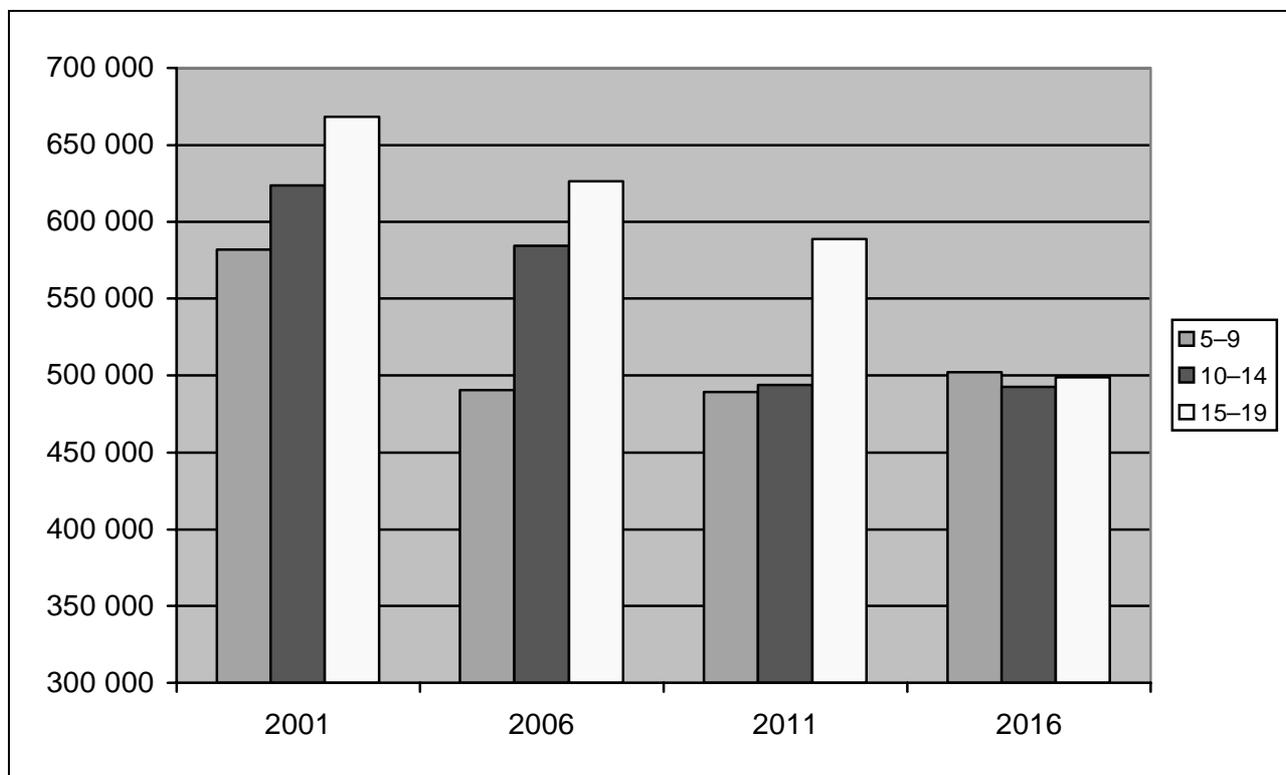


Source: Central Statistic Offices Population Research Institute Estimation database, 2004, (Created by László Hablicsek)

6. Naturally, migration can alter these demographic rates. The estimations of population generally assume a positive measure of migration (0,08-0,12%), which means a low compensation for the decrease of population resulting from the natural reduction. The resources of immigration are mainly ethnic Hungarians living in the neighbouring countries; therefore, the majority of foreigners giving 1% of the Hungarian population are mainly of Hungarian nationality. Most immigrants are from the active age group, which has a favourable effect on the age pattern of the population.

7. The migration within the country has had a low effect on population rates; on average 2.4% of inhabitants change their place of living for a longer time. The characteristic tendency of the last few years is moving out from big cities and thus the increase of the number of population in the settlements of the agglomeration area. Generally, the settlements with 2-10 thousand inhabitants gained from inland migration. In the long run, reorganisation, moving back to big cities can be expected. It is clear, that the process of small settlements' and villages' abandonment is to be continued.

Figure 1.2. The expected changes in the number of children in the schooling age in Hungary, 2001-2016

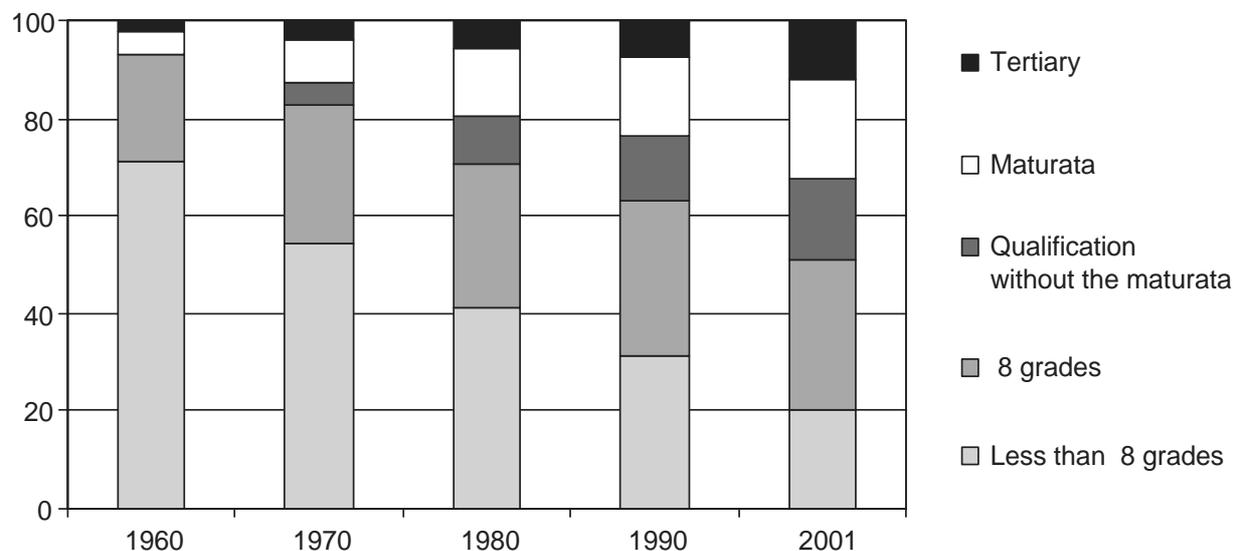


Source: Central Statistic Offices Population Research Institute Estimation database, 2004, (Created by László Hablicsek)

1.1.2. The level of education of the Hungarian population

8. The Hungarian population's level of education is generally described by different measures in the course of the census. This level has gradually progressed, but a large group of the population has only completed the first 8 grades of general education. But at the same time, within the age group above 18, the rate of people completing 12 grades has increased sufficiently compared to the previous decade, while in 1990 their rate did not reach 30%, this rate was around 39.5% in 2001. (Census 2001/2., 2002.)

Figure 1.3. The level of education, 1960, 1970, 1980, 1990 and 2001 (%)



Source: Census 2001/6, CSO

9. The advantage of education is also reflected by the fact that within the group of active employees, the rate of people with secondary or higher education is higher than within the whole population. In 2000 more than 42% of employed men had at least a secondary degree, while almost 60% of employed women had completed at least their secondary studies. According to the data of the census in 2001, the rate of these men within the population older than 15 was 35.5%, while women's rate was 39.5%, which means that the rate of people with secondary education among employees were higher than their rate within the entire population. (Census 2001/2., 2002; Census Detailed..., 2002).

10. The compound of unemployed people according to the level of education has not changed significantly during the last few years. The rate of people with a low level of education has remained more than 30%. The rate of people who completed primary school has changed a little, but the main reason for this is the fact that people with a low level of education are the first to give up the hopeless act of finding a job. Highly educated people face the lowest chances of becoming unemployed. Their rate among employed people is 17%, while within unemployed people this rate is only 4%.

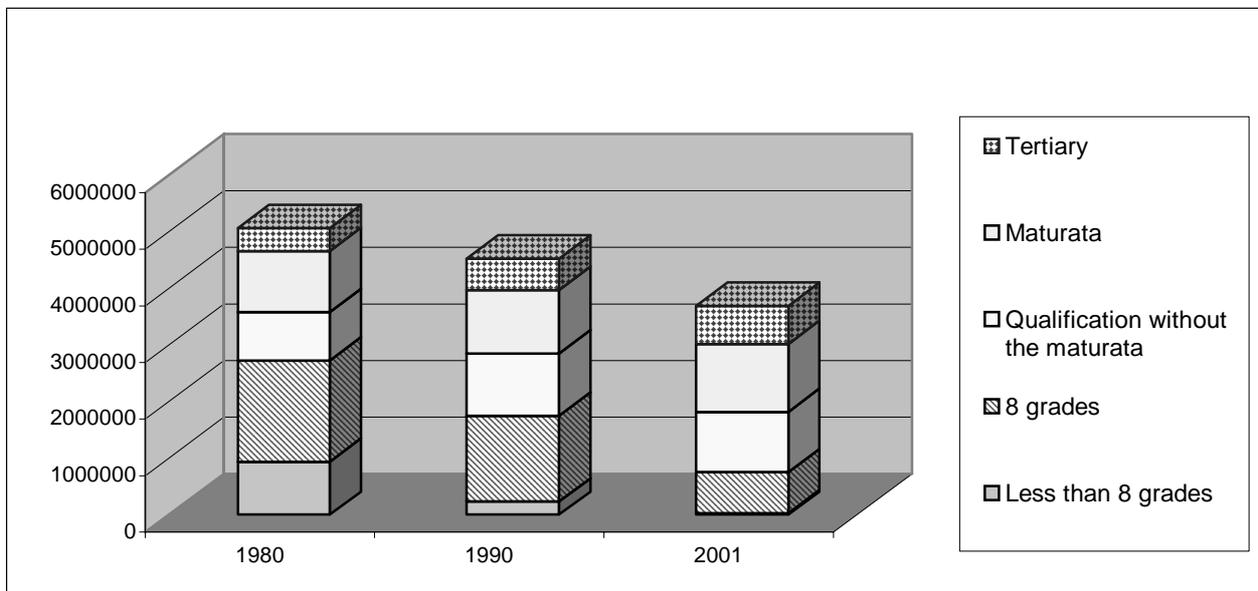
1.1.3. Economy, labour market

11. The main conditions of economic competitiveness are the increasing employment and the development of the quality of human capital. The greatest permanent problem of the Hungarian labour market since the political changes has been the low rate of activity (participation in the labour market), which can be regarded as low in international comparison, and within this, the low rate of employment. In 2000 the rate of people employed was 61%, while the number of people unemployed stabilized at 4-5%.

12. The significant decrease of employment was accompanied by the considerable reorganization of the employment structure. The rate of employees in the fields of agriculture, industry, construction and others decreased sufficiently, while the number and rate of managers, intellectuals and service providers increased. The importance of these sectors increased by 15%, which clearly demands a different degree and educational background. Therefore, regarding the highest level of employees' education, deep changes happened in the field of employment. The number of people with a level of 8 grades or lower education has decreased dramatically (20% in 2001 opposed to the 39% ten years earlier). The main reason for the

significantly decreasing demand for unskilled and uneducated workforce is the restructuring economy and the accompanying technological changes. Lately, this tendency has been strengthened by the wage policy enforcing the substitution of unskilled workers by capital.

Figure 1.4. The number of employees according to their highest level of education, 1980-2001

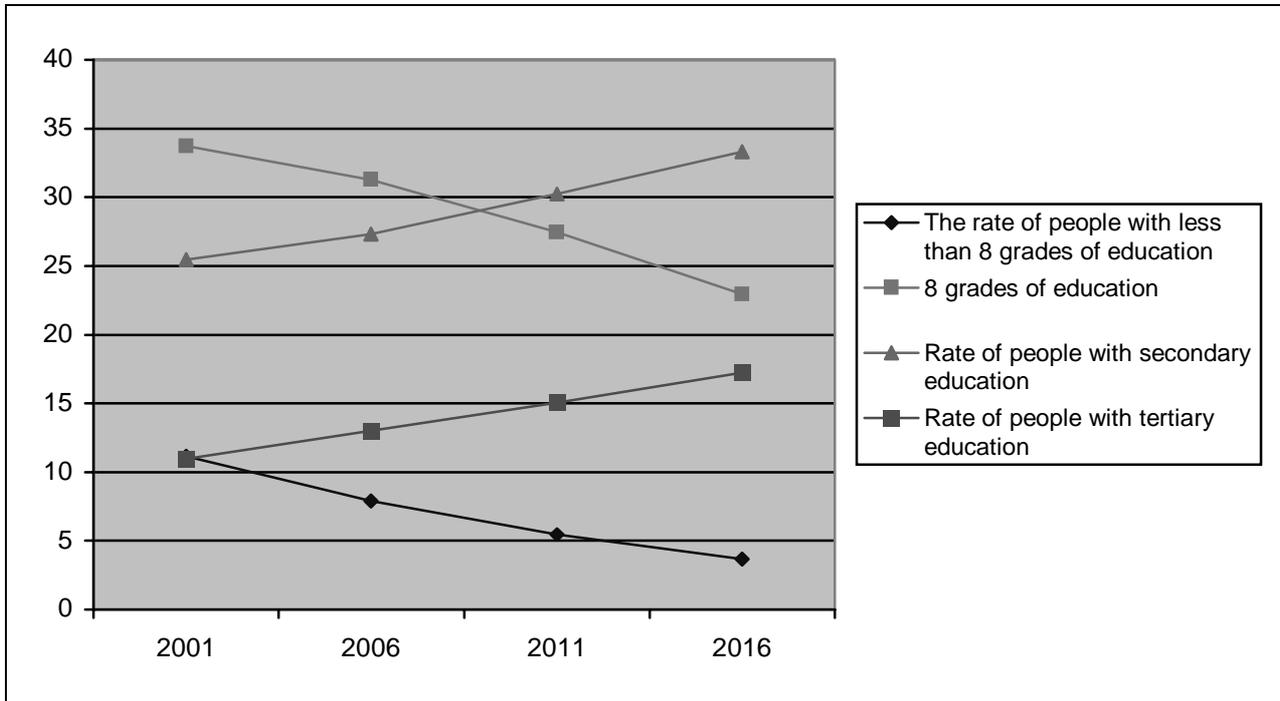


Source: Labor Market Report 2004. Institute of Economics of the Hungarian Academy of Sciences – National Employment Foundation – OFA, Budapest. edited by: Fazekas, K.

13. After the political changes in Hungary, the importance of education has increased the labour market position and the income of people with a secondary or higher education degree became more favourable. The high income for higher educational level proved to be permanent in spite of the significant expansion of higher education. Despite the great expansion of higher education, the over-supply of higher education did not happen, not a significant rate of people with higher education became unemployed and generally, highly educated people are not forced to accept positions at the lower segments of the labour market.

14. In the educational structures of employees, the rate of the groups with a maturata or higher education degree is expected to expand. According to estimates, among people aged between 25 and 54 by 2016 the rate of people with a maturata is expected to increase by at least ten and up to 57% per cent, while the rate of those with a higher education degree is expected to increase by five per cent to 22%.

Figure 1.5. The expected figures of educational level in Hungary among the population above the age of 15 in per cent, 2001-2016



Source: Central Statistic Offices Population Research Institute Estimation database, 2004, (Created by László Hablicsek)

15. Today, not even in Hungary can education be judged only upon the momentary expectations of the labour market, upon the preparation for the expectations of certain occupations and jobs. As opposed to well-defined professional knowledge, the importance of certain general skills and social norms are emphasised, which ensure successful participation in the labour market for a longer period. The “general” skills gaining a greater emphasis in the labour market are communication skills, the ability to cooperate, independency and creativity. Besides professional knowledge, employers expect IT skills and the knowledge of foreign languages, up-to-date economical and social knowledge from young people entering the job market. It is expected that in the course of filling positions requiring higher education and costs, employers will lay a greater emphasis on skills acquired in the course of previous work experience, non-formal or formal learning. However, it is important to note that the Hungarian labour market is quite differentiated; it has segments – especially the small and mid-sized enterprises – where these new expectations are enforced at a limited rate.

16. In the field of spreading and using information and communication technologies - after an ambitious starting period – by the millennium Hungary has fallen under the level of the new EU member Central-East European countries. However, certain indicators (innovation potential, IT facilities at schools, private subscription for broadband Internet accession) show that Hungary’s position is not bad considering regional comparisons; the new communication technologies based on the Internet have not become the part of the society’s everyday life. Hungarian society has several classes and groups, where the spreading of these technologies does not even seem to be a real target. If it stays this way, than in the next decade a significant number of age groups will leave general and vocational education without the most basic competences of the labour market.

17. Considering the state of the environment, Hungary – being several years late – carries out the modernisation and whole scale construction of the environment protection infrastructure supported by the

EU's Structural Funds. The target system and the practices of sustainable development based on environment protection, however even more complicated than that, are not represented in the education and its local application seems to be questionable within the frameworks of the traditional institutions.

1.1.4. Social structure, poverty, Roma

18. The spectacular social transformations of the transition period have become much slower. The inequality of incomes is not significantly high, the quotient of households' highest and lowest deciles in 2003 is 8.4, a little bit increasing. This is an average number compared to EU countries or to the countries of the Central-east European region, there are countries where the differences are higher (e.g. among the transition countries in Poland, or in the Baltic states). Stabilizing social structure is characterised by a 30% middle-class besides the 10% upper class. These two groups are the clear winners of the political changes, while the situation of the similar size "working class" is more unstable. Although it does not happen automatically, among the middle class the spread of well-being can be seen moving from top down, this gives a chance for improvement for those living under uncertain circumstances. According to different surveys, 3-5% of the population lives in extreme deep poverty and in their case the average grow of income does not mean the improvement of their circumstances. The last two groups need a different amount but active support from the community.

19. Education plays a significant role in social mobility and in personal development. In Hungary, one extra year in education results in an 8% higher total amount of income. It is also important considering the skills demanded by the labour market, especially when for example more than 50% of the 16-29 age group does not speak any foreign languages.

20. The lack of integration mainly concerns the Roma population. Considering current demographic trends, the social and economical segregation of Roma and their insufficient education can result that a sufficient rate of the Hungarian workforce will not be employable due to the lack of required skills. While experts estimate the total number of Roma citizens to 5-6% of the total population, their rate among people with a lower than 8 grades of education is 30%. In the long run, the unfavourable educational and labour market trends affecting Roma influence the majority as well, however, most citizens are ignorant towards the problems faced by Roma and do not seem to be interested in improving their socio-economic position.

21. Most of the Roma live in depressed regions mainly in villages. The Roma minorities' position on the labour market, their social situation, state of health and housing conditions are significantly worse than the average. In their case, the different kind of disadvantages strengthening each other result in a marginalization that is very hard to fight, which means that a great number of Roma live in extreme poverty. This situation is sharpened by the strengthening prejudices of the majority during the 90s. Their segregation based on prejudices have serious effects in the long run: low level of education, early dropout and lack of success at school is more and more becoming an ethnic issue. Latest international and domestic research results show that educational discrimination is twofold: on the one hand discrimination is the result, and at the same time the cause of the social segregation of Roma.

22. The unfavourable labour market position of Roma in the active age creates a further boundary for the successful school career for Roma students. According to expert studies, the conditions of learning during pre-school teaching and in primary education have been significantly diverse. The families with a lower income can not afford the higher quality education or the services outside the schooling system. The failure of Roma at school and their disadvantage on the labour market decreases the motivation of both students and parents. In families where the parents have a low level of education the lack of reading and writing skills have a serious effect on students results at school.

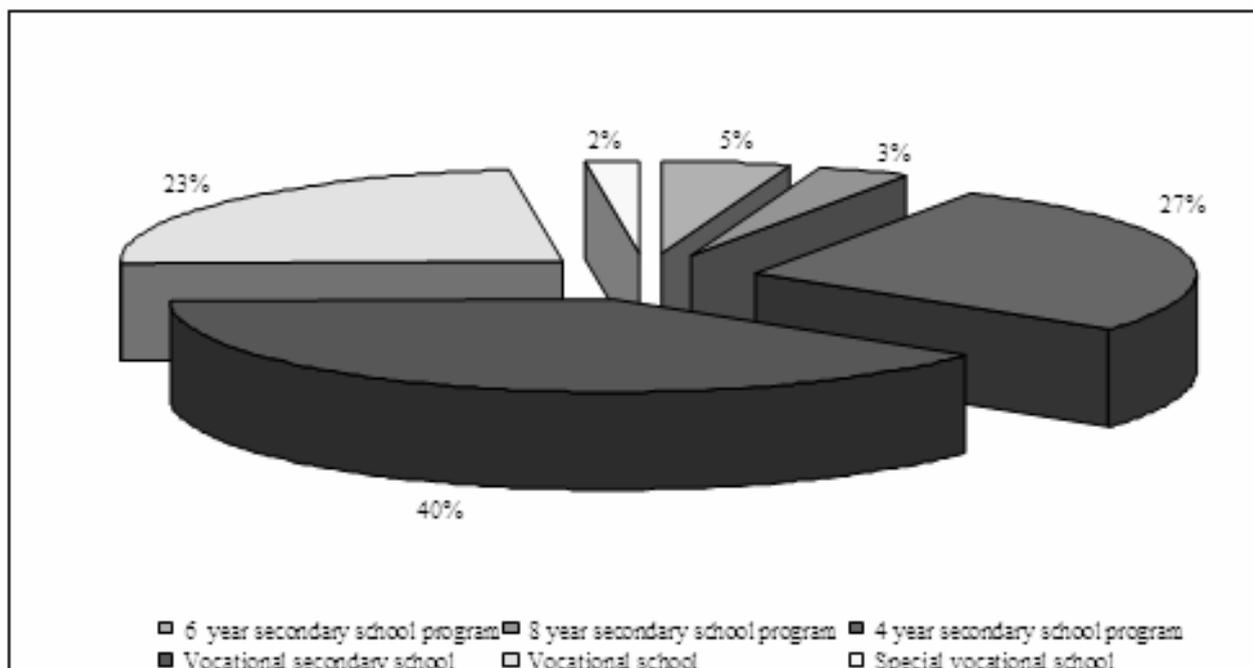
1.2. The structural characteristics of Hungarian education

1.2.1. School structure

23. In the 90s the formation of the Hungarian school structure was a spontaneous process, which was mainly influenced by decentralisation and demographic changes. The most important force of the expansion of secondary education was the intention to keep up the level of the gradually decreasing number of students. As a result of this, the expansion of supplies can be detected considering both the vertical and horizontal structures of education. The most important vertical changes are the spreading of the 6 and 8 grade secondary programs, with which the system enables the 6+6 and the 4+8 structures besides the existing 8+4 structure. The so-called “structure changing” secondary schools were mainly targeted by students in the capital (31%) and the lowest rate of students (18%) applied from village schools. However, it seems that the rate of applicants to the structure changing schools compared to the entire number of students participating in secondary education decreased from the 31% in 2000 to 26% in 2002. The other characteristic of vertical changes is the increasing time of vocational training (expanding beyond the age of 16). Vocational training can be started at several different points: acquiring primary education after reaching the age of 16, after finishing tenth grade or after finishing the last grade before the maturata or after taking the maturata exam.

24. Horizontal alterations can mainly be characterised by the appearance of mixed school types. On the one hand, in the 90s the need for secondary schools providing the maturata has increased (70% of secondary school students start their studies in institutions like this.) On the other hand, vocational trainings’ function and position within the educational system has changed: professional training became secondary, or started after secondary education and the three-year-long vocational training program is almost disappeared. An increasing amount of vocational training programs were separated from the formal school system, which characteristically differentiate between basic vocational training for young people and the vocational training for adults. The latter – accredited higher vocational training programs – can be organized, apart from the institutions of higher education, in vocational secondary schools after the sufficient accreditation processes. Those participating in the training programs receive a qualification acknowledged by the state, which can be used in the labour market as a high level qualification, or a certain amount of previous studies, with certain credit values can be included in further higher level studies. The modification of the structure of vocational training at the same time means the alteration according to different professional fields.

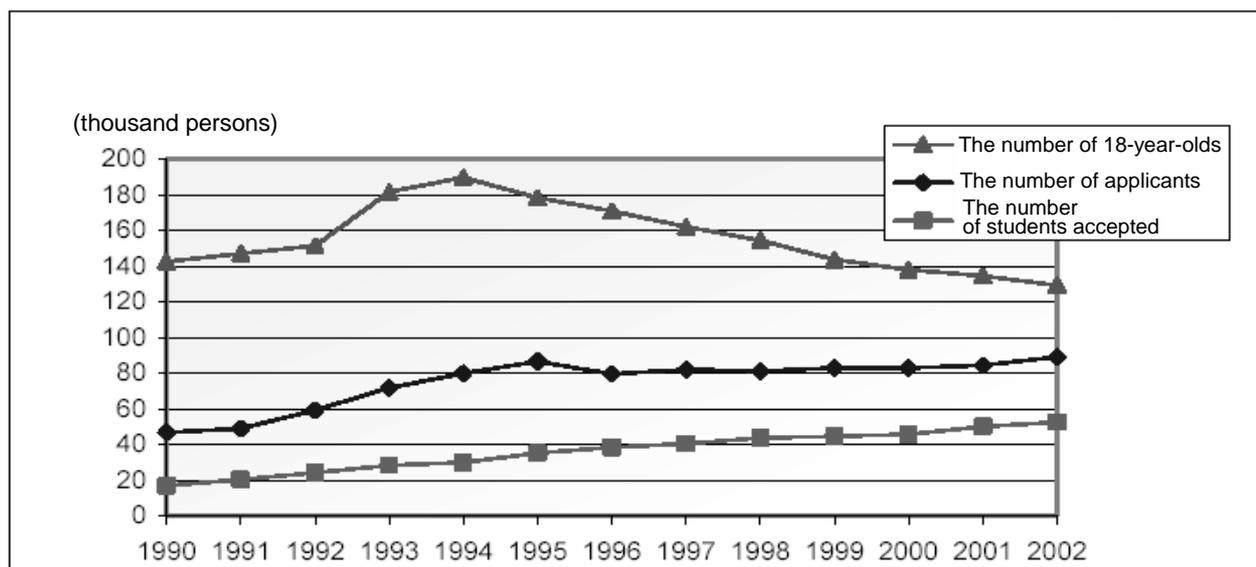
Figure 1.6. The rate of learners accepted to secondary education in the 2003/2004 school year according to school types



Source: The Ministry of Education

25. The higher education sector is continuously expanding. An increasing number of institutions are being established –mainly not by the state – and, however, as a result of merging institutions their number has decreased a little, during the last few years the increasing number of faculties has indicated expansion. Naturally, the reason for institutional expansion is the growing demand for higher education after the political changes. The number of full-time higher education students has become two and a half times bigger during the last decade and the number of all students, including full-time, part-time and corresponding students, is more than three times higher than before. It is an easily recognisable trend that despite the fact that the number of the 18-year-old age group decreases year after year, the number of people applying to higher education does not decrease but increases.

Figure 1.7. Number of applicants for full-time tertiary education and those accepted, 1990–2002



Source: Central Statistics Office, Statistical Report, Higher Education (2003, 6)

1.2.2 The governance and management of education

26. The Hungarian public administration system is strongly decentralised and it is based on the principle of subsidiarity. Its basic levels are settlement municipalities (local self-governments) and county municipalities. The system of local municipalities is highly fragmented. Basically, all settlements practice by-law ordination, which means that due to Hungary's fragmented settlement structure, the number of municipalities reaching the minimum of size efficiency is very low. A significant rate of small settlements realizes a part of the public services they have to offer within the frameworks of the so-called regional partnerships, which, however, does not restrict the independence of municipalities. The county (and towns with a county status) is the level of regional administration with a municipality, which has similar administrative licenses as local municipalities. The regional level does not have municipalities and its role is highly restricted.

27. Educational administration is integrated into public administration (there is no structurally separated educational administration), the most important local and county level educational management decisions are made by elected councils of the municipalities. The owners of educational institutions are the local and –in cases of secondary institutions characteristically – the county municipalities. In the role of county municipalities the institution maintainer's roles and the county (and regional) level coordination of development are combined. Therefore, in Hungary all decisions connected to the operation of educational services, such as the foundation or closing of schools, institutional budget, pedagogical programs (curriculum), appointing managers, etc. is administered by local or county municipalities.

28. Financing of education is also adapted to the above described structure. There is no direct financial connection between the central budget and different educational institutions. The central budget subsidises municipalities to enable them to fulfil their mandatory servicing tasks connected to education within a system of normative subsidies, which is based upon the number of students educated by the municipality. The per capita normative subsidies differ according to educational level and other normative subsidies are connected to different tasks (e.g. the education of minorities or students with special needs), which are not earmarked. Normative budget subsidies cater for an average 70% of municipalities'

educational costs, which is complemented by municipalities' own income. (In Hungary, all locally provided public services are financed by the state this way, so the amount of public financial resources available for educational services always depend on the entire budget subsidies received by the municipality –and not only for education- , on the municipality's own income and on the priorities set by the municipality.)

29. The responsibility of national educational administration is shared by several ministries. The latitude of the most important participant, the Ministry of Education, is highly restricted due to decentralised educational administration; opposed to the direct means of administration, the indirect means employed for the strategic steering of education gain a greater importance. The slowly established system of its instruments are targeted to influence the "behaviour" of local actors of education (municipalities, school managers, teachers etc.) without restricting them. This plays a significant role in enforcing such educational priorities such as equity of education. The employment of traditional regulatory and financial instruments did not prove to be effective. National educational administration's room for manoeuvre is further restricted by the fact that the mechanism of regional development receives a greater emphasis – also due to the decentralised utilisation of the financial resources provided for educational development from the EU's structural funds.

1.3. Opinions and approaches to equity

30. The two basic questions connected to the measure of equity in education and to the effective policies are the identification of illegitimate amount of educational inequalities (requiring public policy intervention) that can be indicated by different social dimensions on the one hand, and the boundaries of state responsibilities on the other. Although, both questions depend on the orientation of values, most European countries following post-modern values consented over several values during the 90s. In Hungary, however, the egalitarian nature of the previous regime and its official orientation of maintaining the appearance of equality have affected the discourse on educational equity so far. This is clearly indicated by the terminological confusion connected to the issue. In public discourse and in the discourse of politics and public policies it is characteristic to use the notion of *equal opportunities*, while apart from a small group of experts, the notion of *equity* is not used. This is the reason why the main consideration of the discourse on inequalities is the standpoint of "the same to everyone", which naturally causes the freezing of inequalities. During the one and a half decades since the political changes, the plurality of values has become open and spectacular, but the influence of alternative set of values (such as the liberal values standing closest to the principle of equity or the elitist conservative set of values traditionally strong in Central-East Europe) opposed to equalising approaches on public political discourse is weak- due to their lack of popularity.

31. This is connected to the overestimation of the state's role (public redistribution), which is also inherited from the previous regime. From certain aspects, this might be a legitimate approach, since in Central-east Europe the different modernisation waves were realized with strong state intervention. On the other hand, however, considering public services, the approach highlighting the exclusive role of the state is prevalent. One of the spectacular signs of this fact is the more than a decade long debate between the principles of welfare subsidies given to everyone or according to needs. The last attempt, which would have connected certain subsidies or public services to needs, was the so-called "Bokros package" in 1995, which failed due to wide public withstand. (This included the initiation of a small amount of tuition fee for higher education students, which would have been compensated for in the cases of poor students by the state.) The failure of the "Bokros package" disqualified the principle of giving subsidies according to needs for another decade, which was only reconsidered by the careful steps of the current government. The spectacular sign of the trust in state regulatory instruments is the currently ongoing debate, which is focusing on the restriction of the free choice of schools in order to decrease early selection and the

proposals of reorganising obligatory schooling districts. (The right for the free choice for schools was one of the important results of the political changes.)

32. The right for the free choice for schools is not available for all, families with lower income, or level of education, and ones living in small villages only hosting one school can not live with their rights. (G. Kertesi – G. Kézdi: Segregation in Elementary Schools – reasons and effects; Budapest, Munkagazdaságtani Füzetek 2004/7

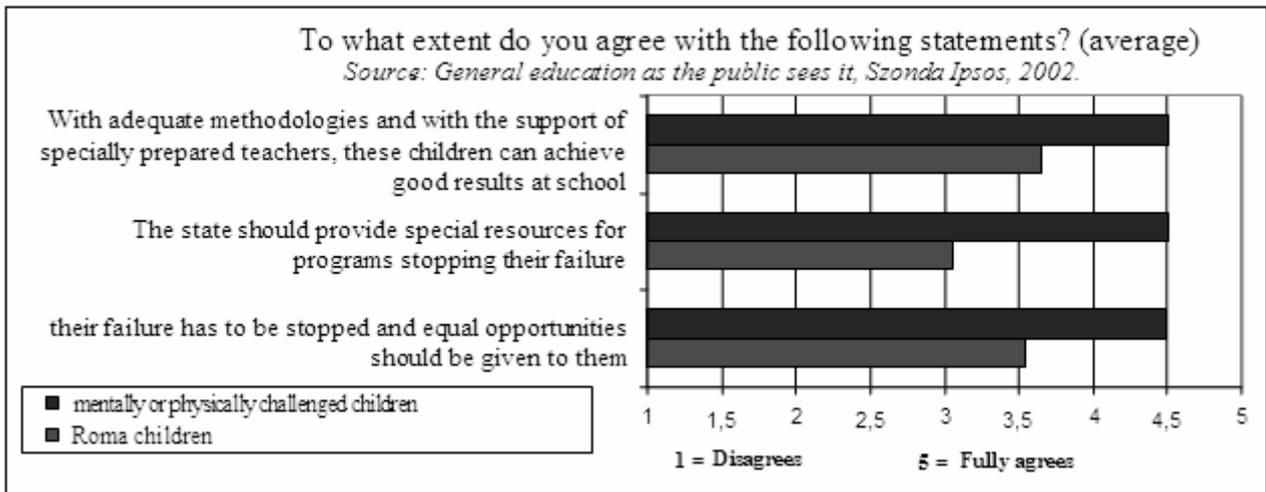
33. As a response to the higher number of Roma students in schools, the well-to-do families take their children to new schools, sometimes even to ones in other villages. As a result in Hungary the right for the free choice for schools supports the development of segregated schools. In areas where Roma students form the majority, significantly more students commute to schools in other villages in comparison to areas where Roma students are in minority. This shows that the regional high representation of Roma students is mainly due to the fact that that school-aged non-Roma children are taken to other schools. (Gábor Havas – Ilona Liskó: Segregation in the Education of Roma students in Elementary Schools, 2004.)

34. The policies supporting the development of equal chances of schooling students at a disadvantage is being developed these days.

35. In order to make The right for the free choice for schools available for children coming from families with a social-economic disadvantage, the modification of the law on public education was proposed. According to the modification, after the obligatory entrance procedures, elementary schools must favour the acceptance of students living in the settlement where the school is, and the rejection of students with accumulated disadvantage may only happen in case the school has reached its maximum capacity. If a school cannot accept all the successful applicants, the students must be selected on the basis of a lottery. According to the data, the schools with a high number of Roma students are less equipped, their infrastructure –condition of school building, classroom equipment, lack of tools, condition of furniture- is worse (Havas-Liskó, 2004.) Lawmakers intend to seize the free choice of student selection that can be seen in some schools, meaning the right to select students with better social-economic backgrounds that would lead to the further widening of the gap between schools.

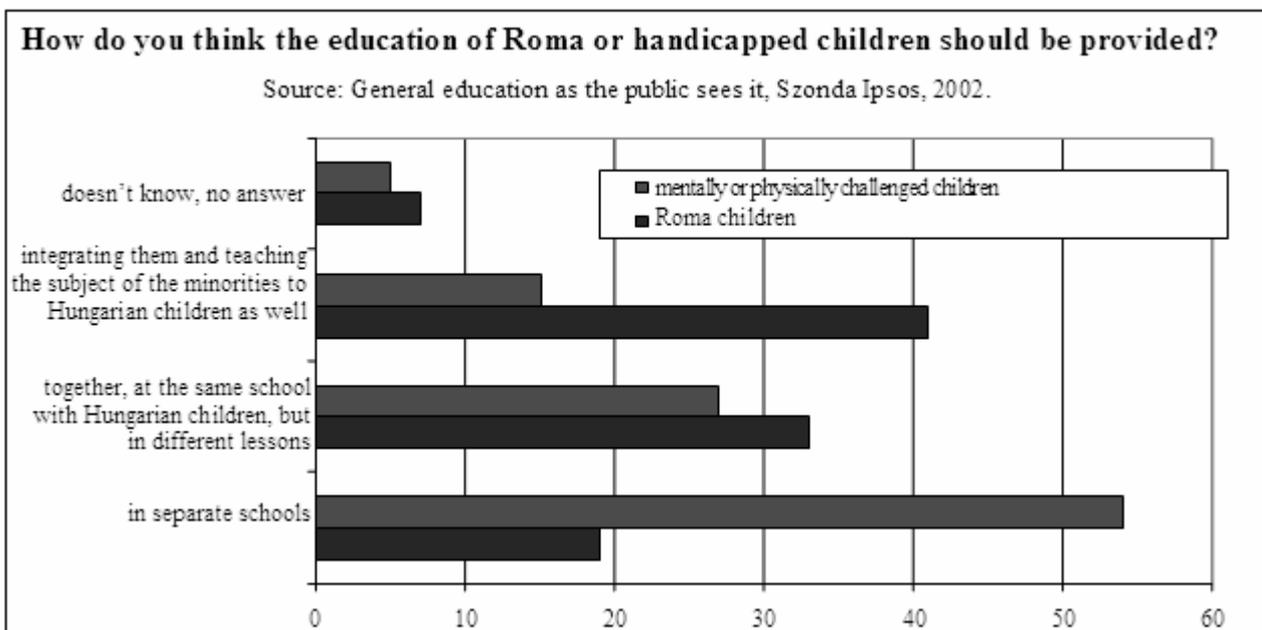
36. The egalitarian and state Centred approaches in the Hungarian society do not signal the great importance of problems connected to inequalities. This is indicated by the results of a representative opinion poll carried out in 2002 studying the attitudes towards education. In the course of ranking different financial targets, the highest sum was given to improvement of teachers' standard of living (6.03) and teachers' professional development (5.78), while the important financial aims connected to the maintenance of equity gained places at the end of the rank: for example scholarships, food, afternoon childcare (3.69) and supporting children with a disadvantageous social background (3.50). Obviously, the judging of different learner groups that can be identified according to different dimensions of inequality is not the same. The subsidising of students from a low social background (poor students) and students with special needs are more accepted than subsidising Roma surrounded by strong prejudices. This is the reason why, however, since the beginning of the nineties a widespread positively discriminating subsidiary system has been operating in Hungary, the social acceptance of subsidies provided for Roma students (e.g. the secondary and higher education scholarship system) is low. Partly this is the reason why the instrument system targeting the social integration of Roma students is aimed at "students and families from a disadvantageous social background". The other reason for this public policy approach is the vagueness connected to the disadvantages affecting the Roma; there has been a more than 25 years long debate in Hungary on the relative importance of social and ethnic dimensions of their problems. Educational inequalities between boys and girls have not appeared in the public discourse yet and bringing on these problems surprises the public in Hungary.

Figure 1.8.



37. The public policy discourse on the education of Roma students is highly influenced by the movement for human rights, which, even accompanied by strong governmental support in some periods, can not break the local mechanisms of segregation, but it has an effect on legitimate public discourse. This is the way of the formation of a peculiar duality that the segregation of Roma students is a less and less an accepted behaviour, but the number of segregated Roma classes do not change. This duality is demonstrated by opinion poll data, only a small part of Hungarian inhabitants think that Roma students should be educated in separate schools, while they think that mentally or physically disadvantaged students has to be educated in separate schools. (The integration of students with special needs was taken on the agenda of educational policy only in 2002.)

Figure 1.9.



38. The public policy discourse connected to the equity of education is also highly influenced by the nature of information available. While earlier the only basis for identifying inequalities in education were the statistical data of progress of students within the educational system, from the second part of the 90s there is an increasing pool of data available on learner performance. This plays an important role in the fact that while in the 90s public policy discourses were highly dominated by notions connected to institutional selection, later the more concealed mechanisms resulting in selection were highlighted, such as the low efficiency of the primary schooling period, the lack of differentiating pedagogical culture, or the quality deficits that can be identified in the operation of schools. (This report also reflects this change of emphasis.) The duality appearing in the approaches to equity problems strengthened the debate on the essential policies as well. With a certain simplification two characteristic educational policies are prevailing: the first one lays emphasis on institutional elements (school structure and educational organisation) and on curriculum, while the second one is emphasising the changes of pedagogical paradigm and the development policy connected to this, and the output measurement and assessment tools of regulation. The practices of educational policy in Hungary are closer to the first approach.

39. Higher education is a relatively new field for public policies meant to increase equity in education. While earlier higher education's role to educate the elite was exclusive, the very intensive expansion of higher education raised the question of the participation of different social groups. The debate on this enriched the discourse on equity with the aspects of personal and public gains and returns. The result of an increasing attendance in higher education is that the consideration of equity strengthened in the debate over the new maturata exam substituting the entrance exam to higher education and in its system of tools of the current government the preferential rules enabling students with a disadvantageous social background to get into higher education appeared.

CHAPTER 2. PROFILE OF EQUITY IN EDUCATION

2.1. Passing and failure in learner careers

2.1.1. Pre-schooling

40. Pre-school education is available from the age of 3 and is compulsory from the September of the year the child turns 5 years old. It is also possible to enrol during the year. In case the capacities are met, the child is put on a waiting list. Parents may freely choose any kindergarten, but only the institution of the district where the child lives has the obligation for acceptance. Pre-school education is free of charge. The expenses of the meals provided are to be covered, but the needy, the ones receiving support on the basis of the child protection system receive free meals as of September 2003.

41. The better the head of the household is educated, the more they are likely to take advantage of pre-school services. (According to the relevant laws, the application of children living in the institute's district may not be refused, however it often happens due to the lack of capacities.) The results of a research show that besides the fact that rejection of application to a kindergarten happens mostly because of the lack of capacities, the second most common reason is that one of the parents of the household does not work and therefore can take care of the child. This may seem logical from the kindergarten's point of view, however, this may also mean that children in need of the development work done in the pre-school for their later success at school are not given the opportunity.

42. The modifications of the law on public education done in 2003 introduced many new actions to make pre-schooling widely available for the children living in poverty and for the ones who are at compound disadvantage. In regard to the significance of pre-school education a three-year-old at compound disadvantage, the children who are eligible for daycare according to the law discussing child protection and the children whose application is initiated by the trusteeship authority may not be rejected by the kindergarten. (Furthermore, it is against the law to reject any child who is obligated to attend kindergarten.)

2.1.2. People without primary education

43. According to the data about primary education, although compulsory education was extended until the age of 16, during the 90s the number of students leaving day-time education without a primary qualification has not decreased, but increased a little. In the last few years the data has stabilised around 5%, which means 5-6 thousand young people per year (Janák, 2004). The latest data show that half of the students without a primary final will not acquire a primary qualification later either, which eliminates their chances of getting a job. The correction of formal qualification of those dropping out is the school system of adult training. Extending compulsory education until the age of 18 can cause the elimination of primary schools for working people, however their function will be needed later as well. The correction of student failure during primary education is laid upon vocational training school, but it is questionable whether they will be able to come up to these expectations, since they are not really able to keep a significant rate even of those young people at school who have successfully finished their primary studies.

44. The decreasing importance of primary schools for working people was mainly caused by the decreasing learner demand, but the lack of schools' interest also had a role in it. The per capita normative

subsidies given by the state for adult education – especially when only a few students can attend the class – does not inspire institutions to maintain the program in the long run. The lack of separate adult training institutions at the same time decreases the chances for schools to employ specialists experienced in adult training or especially trained for adult education and the chances for offering successful second chance type of programs that can compensate for the lacking basic competences and for social differences.

2.1.3. Secondary level: typical learner careers

45. Secondary schools' expansion was carried out during the 90s and secondary education expanded both horizontally and vertically. The education following primary school, joining secondary training programs and institutions (secondary school, vocational high school and vocational school) became a possibility at several points: at the age of 10, 12 or 14. 89% of those young people, who chose the four grade secondary school were accepted to this training program, 10% of them went to vocational high school and 1% continued their studies in vocational schools. A similar rate of students with the intention of studying in a vocational high school were accepted (88%), a small amount of them were accepted to a secondary school (3%) and 9% of them were accepted to vocational schools (KIFIR, 2001).

46. The typical routes of education following primary school studies is also determined by the size of the settlement. The smaller the settlement is where the student attended secondary school, the more likely it is that he or she aimed a lower level training program for their further studies. Among students who were not accepted to secondary training programs in the first round there is a higher rate of overage students from bigger towns who aimed the least frequented vocational schools, but were not accepted. It is also true that it became spectacular that among secondary schools there is an increasing intention to filter the students and refuse the ones they do not want to accept (*Lannert-Martonfi, 2003*).

2.1.4. Career correction and second chance

Adult education in secondary schools

47. From the mid 90s it has served less the training of “adults” and this way the correction of earlier educational career², but it became a framework for alternative educational career. This alternative training route reversed the earlier sequence of primary and professional training, starting with professional training (in vocational school, daytime), than later providing the general secondary education (within the framework of adult education). This is not only indicated by the learner need mentioned earlier (namely that most students at vocational schools intend to take the maturata exam), but also by the age of participants. Around the Millennium two third of the participants in the two dominant training programs (secondary school and vocational high schooling based on vocational exam) were younger than 25, which means that they apply to these studies as young adults intending to continue their previous studies.

48. The high rate of failure in vocational schools (Report, 2003) indicates that the rate of students endangered is very high in this training programs and with increasing training time to 4 years the danger of dropout also increase. This, and the high prestige of secondary education in the job market, is expected to maintain a high demand for evening-correspondence secondary training. However, in the case of evening-correspondence training the institutions have to be prepared that after the vocational schools those young people facing serious learning and/or social problems, who – sensing the expectations of the labour market – intend to reach the maturata, will appear in this type of institutions. In the long run the two structural changes of the last few years will also have an effect: both (daytime) vocational training, and the (adult) training based on it and providing secondary qualification became a year longer, so this learning route will

² Under this we partly mean a large age group of learners, and partly a group which has already proved to be successful in the job market and seeks for further education possibilities as *active salary earners*.

provide the same qualification as the secondary qualification accessed through daytime education followed by professional training only with a longer period of studying.

Further education with a secondary final

49. The learning route of students leaving secondary education is characterised by three typical directions: (i) heading towards vocational training, (ii) studying in higher education, (iii) transition from education to the world of work. Since the 90s until today, parallel with the process that a great number of people take the maturata exam, more and more people continue their studies on higher levels. At the same time, the transformation of the economy demands highly educated workforce with practical skills, to which the route is provided by “high level” vocational training programs.

Vocational training

50. In the case of students heading towards vocational training, we can claim that an increasing rate of students receiving vocational qualification passes the maturata before vocational training. In 2001 an eight times higher number of students (34,326 people) received qualification connected to the maturata than in 1990 (4,668 people). There was no such a significant increase in the rate of students receiving their qualifications in vocational high schools or in technical schools, and the number of people receiving qualifications without taking the maturata became much lower. Most of the people applying to higher level vocational training is not older than 20, so most of the students apply to these programs right after taking the maturata or after an unsuccessful entrance exam. It is also a typical career possibility from this training program for students to use higher level vocational training as a stepping-stone and with an easier entrance process they continue their studies in an institution providing a higher education degree (*Lannert-Mártonfi, 2003*).

Transition from school to work

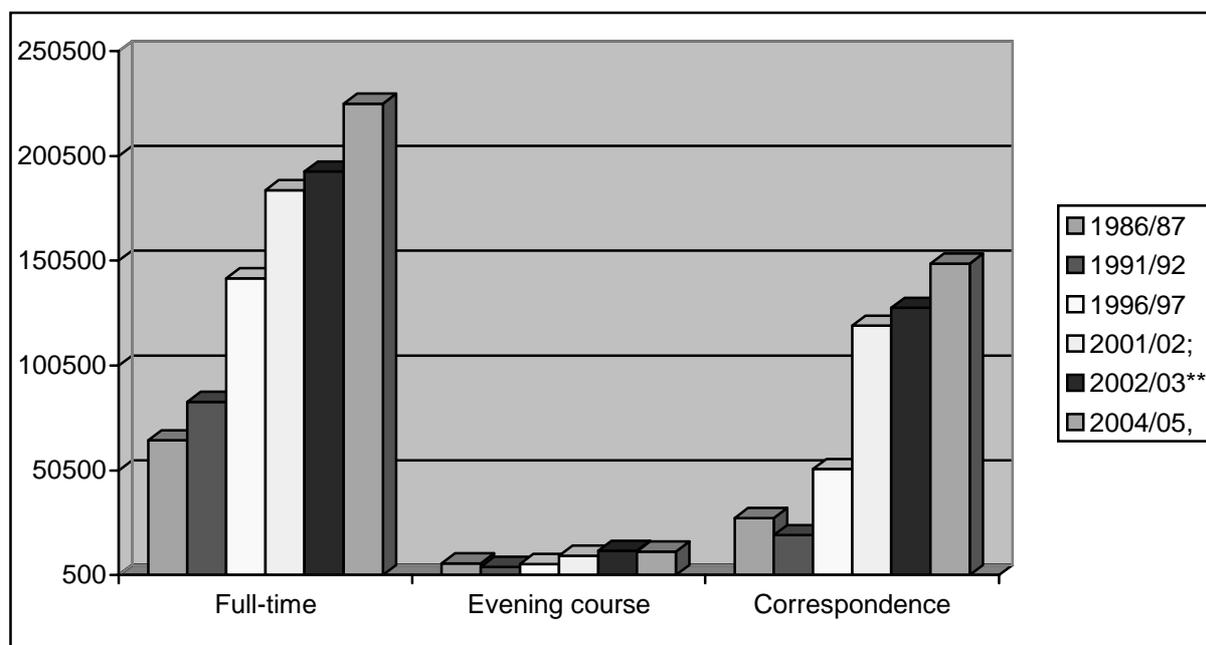
51. The third possibility from secondary level is to enter the world of work, which is not any more characterised by the practices of a period a few decades earlier, which preferred stepping to the world of work right after finishing secondary studies. Today the “transition period” between education and the world of work became typical during the period of becoming an adult. The transition is well characterised by the representation of people in their twenties in the education system, and especially the rate of people between the age of 25-29, which rate has also increased during the last few years. Considering people in their twenties, “double dipping” is also a typical phenomenon, which means that besides working somebody acquires two different degrees at the same educational level. This characterises the young people acquiring a second profession after leaving vocational high schools just as well as highly educated students heading for a second diploma. The career routes characterising this age group have become individualized and they show a very colourful picture, which was not known before. Young adults have left the system of secondary education, but intensive learning periods are included into this period of their lives, let them be within the framework of formal or non-formal learning (*Lannert-Mártonfi, 2003*).

Higher education

52. Although the employment prospects of people with a higher education degree has deteriorated a little and sometimes there is a great demand for skilled workers, the value of the diploma in the labour market is still high: it means more chances for diploma holders to get a job and it also means higher income than any other qualifications. It is also true in cases when the diploma holders find a job in a different professional field. Data in Hungary indicate in all cases that despite the slow saturation of positions for people with a diploma, the extra income obtainable with a diploma has not decreased, only its speed of increase has become slower (*Varga, 2004, Galasi 2004b*). From the individual aspect all these

provide a great motivation for further studies and the undertaking of it costs, since the invested money is expected to be regained – even if not always in the calculated amount.

Figure 2.2. The number of students in higher education institutions according to faculties, universities and colleges, 1986/87 – 2004/05



* together with distance learning

** previously published data

Source: Report, 2003. (Ministry of Education Statistical Report, Higher Education 2001/2002; Data on education 2002/2003, Central Statistics Office; Ministry of Education Statistical Report, 2004/2005.)

High level studies besides working

53. The role of evening, correspondence and distance courses connected to adult education can be further strengthened by the fact that during the last decade the transition process from education to the world of work has changed. While earlier this had a classic process (finishing day-time education within a certain period of time, which is directly followed by undertaking a job) and a correction route (those people who were not accepted into higher education started their evening or correspondence courses during working), today it seems to become more and more common that full-time studying is combined with work, or studying besides working substitute each other in different patterns, not necessarily adapted to finishing a certain training program. The labour market itself demands this practice, since in many cases it requires professional experience, which can be acquired by postponing studies or by working parallel to studying (*Galasi – Timár – Varga, 2004 and Györgyi 2004*).

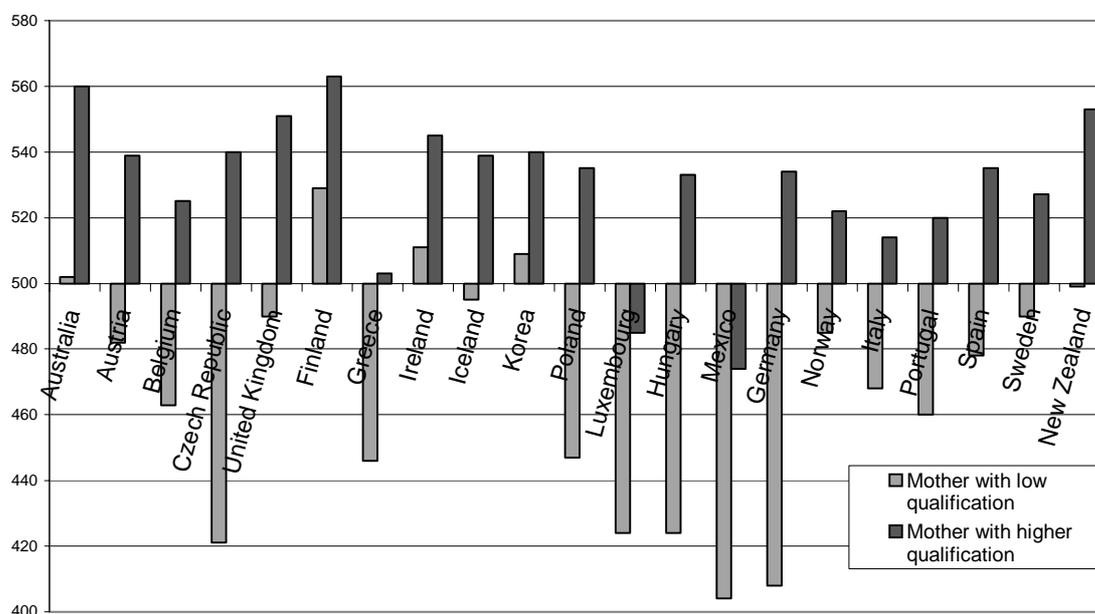
54. To sum up, it can be said that the schooling failure suffered at any level of education can be corrected by the correction routes offered in Hungary, but the utilisation of these requires an increasing personal investment because of the disproportionately long learning periods. The utilisation of these possibilities is made more difficult by the fact that they are offered by an increasingly diverse but less transparent educational system, where students can lose their way more easily. Within these circumstances, in Hungary the importance of currently insufficient system of guidance (career orientation and educational information providing services) is increasing.

2.2. The dimensions of inequality

2.2.1. The socio-economic status

55. According to the results of the PISA surveys, 15-year-old Hungarian teenagers' performance in the three fields of competences, reading, mathematics and science, are worse than expected. However, not only the performance of Hungarian students is interesting, but the fact that among the countries participating in the PISA survey, it is Hungary where the family's cultural capital (parents' level of education, family library) has the greatest effect on student performance. However, this effect is realised through the composition of students at school. The differences between students' educational performances could be derived from the social combination of students at the school to the highest degree in Hungary (*Knowledge and Skills for Life, 2001*), which means that the effect of the family background is also strengthened by the homogenous nature of schools in Hungary. Therefore, schools with or without intention can deepen the existing differences. It is also not a coincidence that in countries where this influence of the family proved to be smaller (Finland, Sweden, Iceland, Korea and Japan), average student performances are higher in countries where family background and/or the inequality between schools proved to be decisive in the formation of student performance (Germany, Portugal, Greece). However, the children of mothers who had primary or lower secondary qualification reached lower results in all countries, than the children of mothers with higher qualification, in countries with better performances (e.g. Australia, Finland, Korea) the differences between the reading skills of the children of mothers with the lowest and highest qualifications is relatively little, while in the cases of Germany, the Czech Republic, Hungary and Poland, this difference is really big. It is interesting that in Finland, the reading performance of the children of the mothers with the lowest qualification is close to the performance of Hungarian children of mothers with the highest qualification (see Fig. 2.3.)

Figure 2.3. Performances according to the mother's qualification showed by the reading literacy results of 15-year olds in some OECD countries, 2000

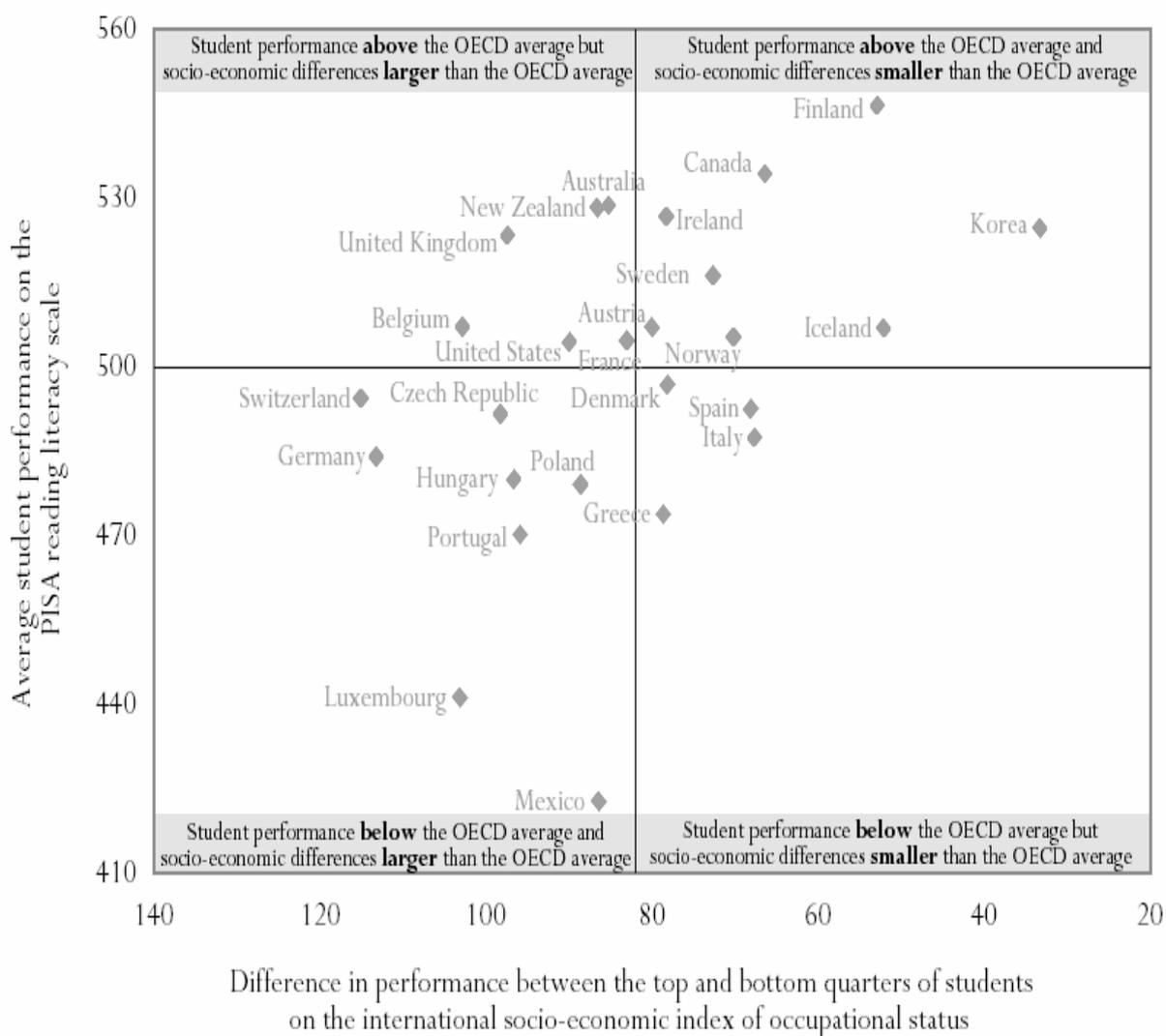


Note: 500=OECD-average

Source: Knowledge and Skills for Life, 2001

56. The data of the PISA survey show that there is a connection between parents' occupational status and children's reading skills. The higher occupational status the parent has, the better the student's reading skills are. However, this connection is not similarly strong in the countries participating in the PISA survey. We can identify four groups of countries according to learners' average performance in reading and according to the difference between the performances of the children of the lowest and the highest occupational status. In Scandinavian countries (especially in Finland) the average performance is high, and the differences between students are small. In Anglo-Saxon countries the high performance is accompanied by bigger differences between students. In South-European countries there are no big differences among student performance that are influenced by the family background, but the average performance falls under the OECD average. In the German speaking area and in Central-east Europe the occupational status of parents has a great effect on performance, but the students of these countries also performed under the OECD average.

Figure 2.4.



Source: Education at a Glance, 2002

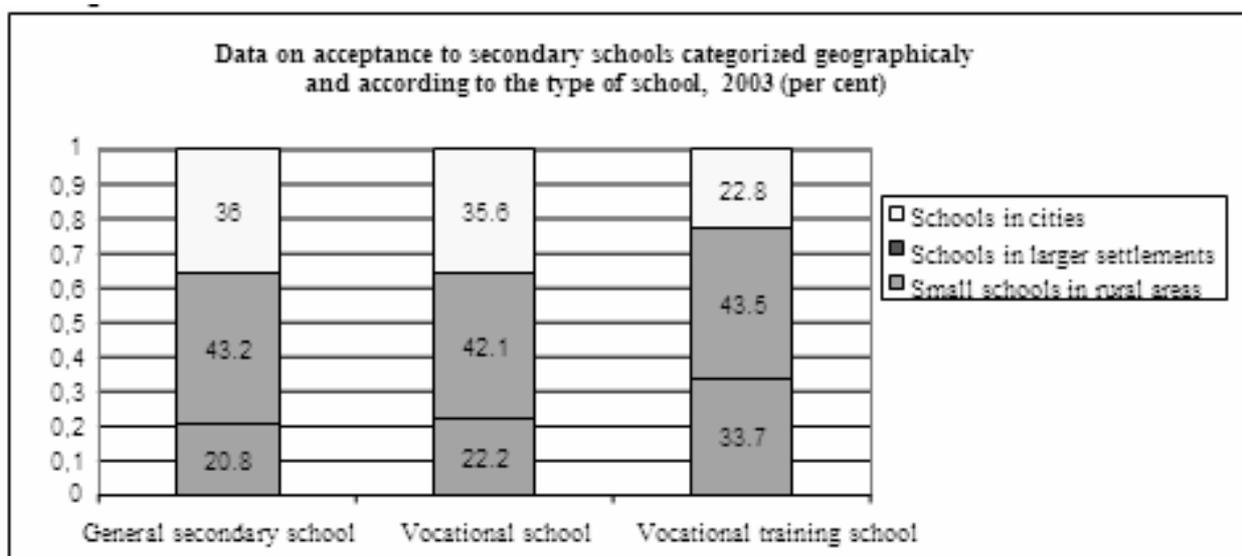
57. At the same time it also has to be highlighted that the strong systematic location of the groups of countries indicate that the roots of the differences can not only be found in the character of educational systems or in the existing differences between the instruments invested into education. The efficiency of different educational systems is probably influenced by deeply rooted dimensions that are difficult to change, such as the countries' historical, cultural (religious) background. This calls our attention to the fact that the school operates strongly embedded into society, so the basic social inequalities represented by educational performances can not be changed by the school alone.

58. Considering the social and economic status participation in higher education is mainly imbalanced. Groups with lower socio-economic status are significantly left out of the educational system following secondary education. The rate of Roma population increases significantly regarding (also) the age groups relevant to higher education. Among 18-year-olds the rate of Roma population was 10% in 2005; in 2024 it is expected to be higher than 14%, while in 2050 it will exceed 20%. Obviously –however, we do not have correct, empirical data in this field- their rate in higher education institutes will not even be close to these numbers.

2.2.2. Residential status

59. The regional dimension of inequalities within the educational system in Hungary is a widely documented phenomenon. The differences according to students' place of living are peculiarly eye-catching when examining learner progress within the educational system, the accessibility of further education opportunities and the aspirations connected to these. Regarding settlement sizes there are great differences between the human conditions of education, especially from the aspect of having enough teachers with the majors required. Similarly, great differences can be proved regarding the objective conditions of education, however, from this aspect the regional differences are dominating over the differences between settlements. There are also great differences among school programs and the operation of institutions. From this aspect it is a surprising experience that parents' involvement in school life is more characteristic in bigger settlements than in the smaller ones (*Híves–Imre A.–Imre N., 2002*). As far as secondary schooling rates are concerned, the smaller the settlement is where the primary school operates, the bigger the chances that the students learning there will apply to a vocational school. The data of acceptance show the same tendency.

Figure 2.5.

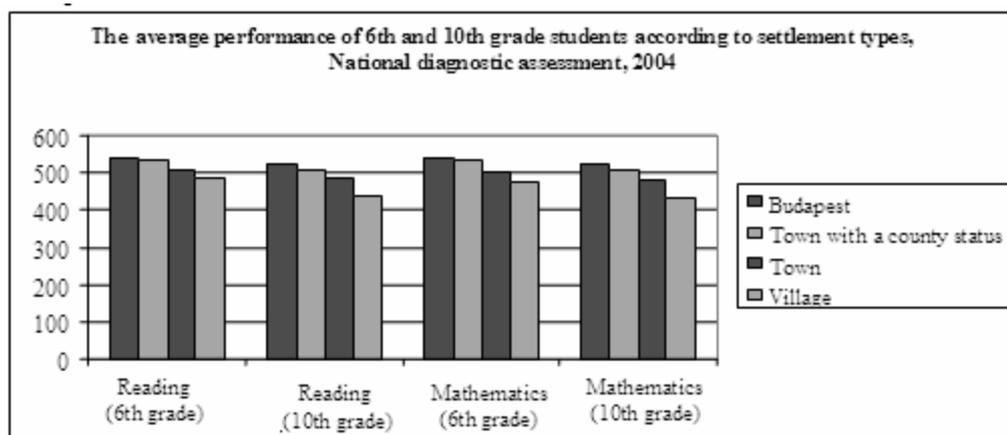


Source: KIFIR 2003. database

60. Nevertheless, even if the settlement gradient is expressed both in the applications' and acceptances' division according to the place of education, i.e. the smaller the settlement is where the student attended primary school, the more likely it is that he or she will apply for a lower level of education in the course of their studies, this does not mean that in the success of their acceptance of students from villages should be at a disadvantage compared to their fellows from towns. On the contrary, since they apply to institutions with a lower status, generally they are more likely to be accepted to the school they chose.

61. According to the data of the national measurement of students' competencies based on sampling, the existence of the "regional difference" is not only clearly demonstrated, but the data also show the amount of this difference in grades 6 and 10 (in grade 10 the difference is bigger), and how big it is considering reading skills and mathematics (in the case of the latter it is bigger). Counted on the standard scale with an average 500 points, the biggest difference can be found between students in the capital and in villages in grade 10 in the field of mathematics (see Fig. 2.6.) Among tenth graders the difference is considerably big between the learners of vocational schools and schools providing the maturata: the average of the former is smaller than the minimum of the majority of the population (*Vári-Auxné et al., 2001*).

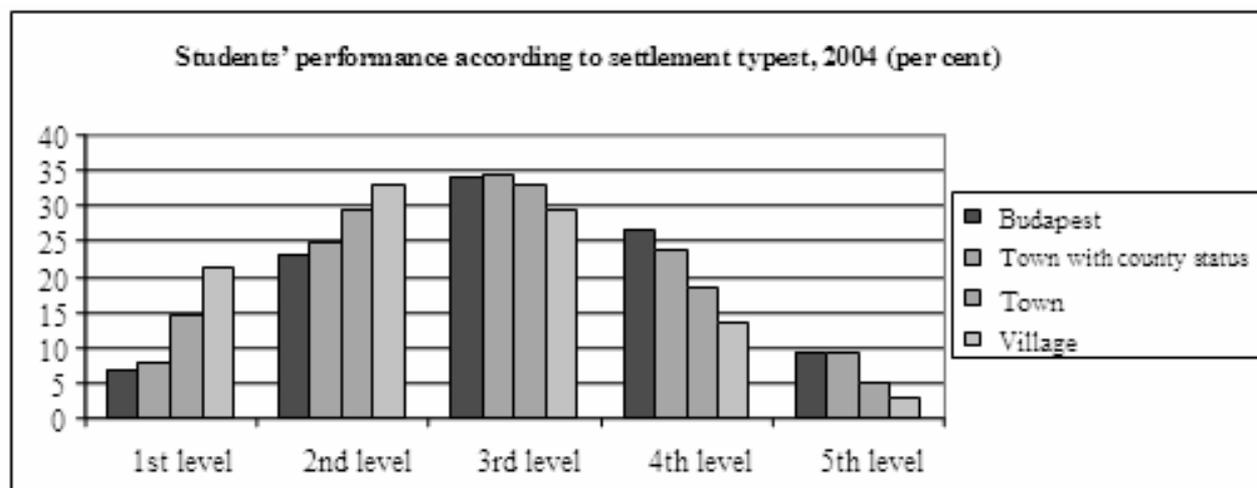
Figure 2.6.



Source: National diagnostic assessment, 2004

62. The assessment of student performance with standard testing is important because the marks given by teachers can only provide a limited picture of student performance. The same marks given in different schools can mean very different knowledge, which is clearly signalled by the analyses based upon the data of the PISA survey. According to this, the marks received in schools of towns could cover 8-9% higher results in standard points than those received by students in village schools (see Fig. 2.7.)

Figure 2.7.



Source: National diagnostic assessment, 2004

63. In connection to this, it is important to note that among the tenth graders the differences between the performances of students in town and in village schools have increased continuously. At the same time, it seems that by the Millennium this process has not only slowed down but stopped. The data of the year 2001 Monitor survey show that the differences between the two categories fell back under the level measured in 1995. In order to find the reasons of these changes further research should be done. Those factors could have played a part in this process such as the fact that a greater number of town inhabitants moved out to smaller settlements or it is also possible that the schools of smaller settlements gave a stronger reaction to the curriculum modernisation initiatives.

2.2.3. Ethnicity: the education of Roma students

64. The most neuralgic point connected to the education of Roma students is the discrimination against them within the education system. The way of the segregation of Roma students within the educational system is known in other Central-European countries: it is carried out by directing these students to special classes or schools organized for students with mild mental disabilities. Almost 50% of children attending these schools are of Roma origin, which means that their proportion in these schools is five times higher than their rate in the entire educational system. The fact that the regulations of the conditions of streaming students to special classes were strengthened several times did not change the process of these schools operating as the "stock" for Roma students. The great number of Roma students in these institutions that offer no chance for further education or for finding a job is not a sign of the mental incapability of Roma students, but it is the sign of discrimination and the failure of mainstream public education institutions' pedagogical practice.

65. Discrimination at schools has different levels. Discriminatory school practices range from lower level education and segregation to a different extent to getting rid of Roma students (failing, exemption, direction to special schools or classes). Lower quality education does not necessarily require segregation; it can be realized through "differentiated teaching and assessment". This process is characterised by decreasing the requirements for Roma students and narrowing the time spent on the student, moreover the lack of curricular activities (swimming, foreign language, IT, etc.) that most non-Roma students are provided with. (Report, 2000)

66. In the more lenient cases segregation means separation within the classroom, while in more extreme cases it means the organisation of a Roma class. This can have several different forms, far too many Roma students attend special institutions or within the schools Roma classes are being formed under the titles of correction or catching up classes. While in 1992 only every twelfth Roma student studied in schools where Roma were in majority, today every fifth or sixth. The development of Roma students educated in segregated classes is very often poor, and their re-integration to their former classes becomes impossible. Segregation strengthens and conditions the distance between the majority and minority, so it has an immeasurable detrimental effect on the kids belonging to the majority, too. Roma classes are just as well the dead ends of general education as special classes are (Report, 2000).

67. The results of a research carried out in 2004 show that segregation within primary schools (the organisation of segregated classes) happens in village schools more often. It is generally true that the bigger the settlement is, the less is the chance for segregation within the school. The most characteristic method of this is to organise parallel classes offering different extra services (optional), which due to different requirements for acceptance and due to different curricula divide learners according to their ethnic and social status. The chances of Roma learners to get services with a higher level than average are 50% less, but their chances to get lower level services than the average (catching-up, correction classes) is twice as high. During the last few years, despite the initiatives of the government, the amount of segregation of Roma learners hardly decrease and it still affects far too many children (Havas, 2004).

68. During the last 15 years the amount of segregation between schools has definitely increased, which means that there is a growing number of schools educating almost only Roma children. Among schools that educate more Roma children, the rate of learners increased from 23% to 40% and the number of those schools where the rate of Roma students is more than 80% became sixth times higher. The increase of this rate differs according to settlement type; the highest number was reached by schools in Budapest and in villages. The most important reason for this is the fact that if the rate of Roma children start to increase in a school than it is followed by the leaving of non-Roma learners and the school becomes a “ghetto” school. In the cases of villages, the increasing rate of Roma inhabitants (residential segregation) is the reason for the high rate of Roma students, but in the towns involved it is clearly the result of segregation between schools (Havas, 2004).

69. Due to the lack of data, unfortunately almost no conclusions can be drawn about the different ethnic groups participating in higher education. But it is for sure, that the Roma ethnic minority is highly underrepresented in higher education. Since ca. 19% of the Roma minority continue his/her studies in secondary schools providing the maturata (Havas et al. 2002, 184), it is principally out of the question that Roma learners get a diploma according to their proportion in the population. According to the “latest” data from 1994, only 0.2% of the Roma ethnic minority studies in higher education institutions.

2.2.4. Personal abilities

70. The law on general education provides the right for special care and rehabilitation to those children whose special development incapacitate the usual completion of education. The right for special care is the basis for the different forms of supplementary subsidising within general education. The children entitled for extra subsidies are classified into two main groups by the general education law: (1) *Handicapped children and learners*: physically disabled, illness of sense organs, mentally disabled (learning difficulties), speech disabilities and other types of handicap (autism, particular skills problems, dyslexia, pathological hyperactivity etc.) children and learners. (The right for extra subsidies is determined by the National Expert and Rehabilitation Committees Examining Learning Problems.) (2) *Children and learners suffering from integrational, learning and behaviour problems*. (The right for extra subsidies is determined by the local Educational Consultants.)

71. The general education law name further groups of children, who do not need special care or rehabilitation, but still need extra subsidies. These groups are the following: a) the learners with a permission to follow individual learning paths in grades; 1-4., b) learners receiving catching-up education in grades 9 and 10 after the age of compulsory education; c) children from a disadvantageous social background; d) learners with the chance of failing; e) learners who need catching-up; f) learners belonging to national or ethnic minorities. These groups of learners can not always be separated from each other. In some cases there are several reasons why extra subsidies can be given for the education of a child. According to the law, in these groups the different forms of extra services have to be included into the pedagogical program of educational institutions. These programs are the following: catching up and eliminating differences within the framework of differentiated education; organising separated classes; applying special services within the framework of optional classes; the reduction of the number of learners per class (e.g. in the case of taking a learner with an integrated curriculum).

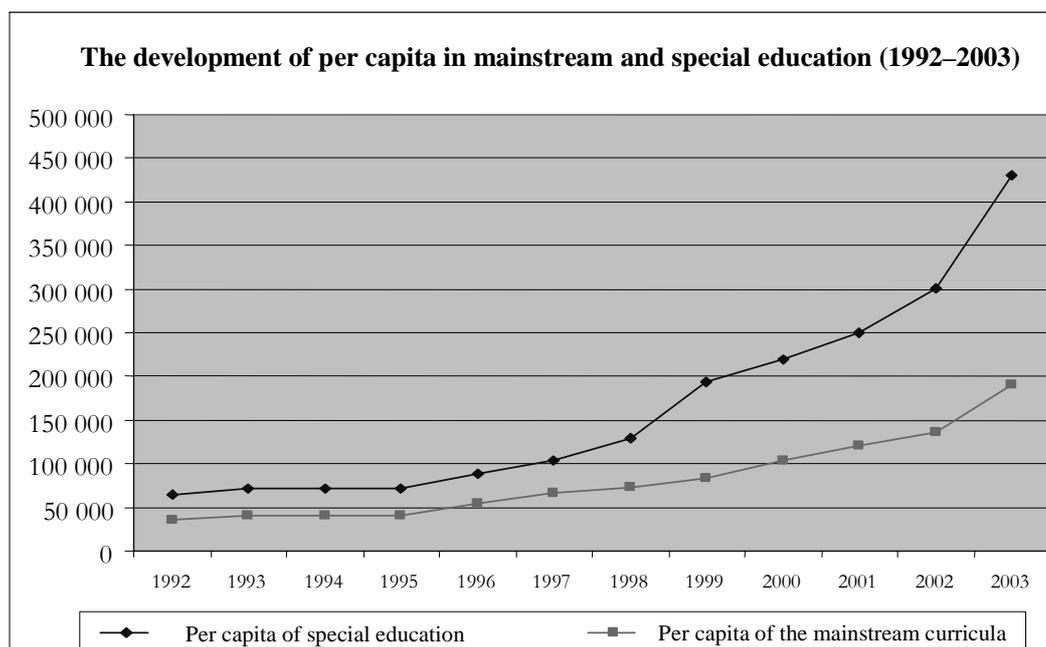
72. Regarding all these, the law names three big groups of children/learners. Almost 80-85% belong to the first group and they are the healthy learners. In the cases of them the alignment with their personal peculiarities is not the same, but it is uniformed in the way that there is no law regulating it and principally it is realized within the framework of differentiated education by the teachers and schools. Approximately 10-15% of children belong to the second group, who are named by the general education law and to whom it provides extra financial resources, which –as they are intended – enable schools to provide a service for them which exceed the level of the average. The third group includes children who need special care or rehabilitation, namely handicapped children or learners with serious integrational, learning or behaviour problems. The rate of these children is 5-10%.³

73. The basic institutions of the system formed in Hungary are the expert and rehabilitation committees. The duties of the committees cover three main areas: 1) screening and examination of handicap (expert activities) 2) making suggestions according to the results of the examination to the child's/learner's special care, the method, form and place of the service and the pedagogical institution that should carry out the rehabilitation; 3) examining the conditions necessary for maintaining special servicing (system development).

74. One of the most debated educational questions of the last few years in Hungary was the problem of integrating or segregating learners with special educational needs. The segregated special educational network is being criticised that, although, they often operate on a high professional level, they are not able to support the social integration of children they educate, so often they operate as parking places that decrease children's chances for life. Similarly to other European countries, those educational organisation methods are becoming more important in Hungary as well that intend to integrate children with special needs, thus decreasing the inequality of opportunities. The significance of this is particularly high, because – just as well as in other countries of the region – the number of children in special education in international comparison is very high. The sensitivity connected to the issue is strengthened by the fact that special educational institutions became the institutional channels for segregating Roma students.

³ The international comparison of special education is very difficult because these groups are defined in different ways. Other countries usually define these groups in the need of special support with different titles and reasoning in their education laws. For example in Germany the sphere of obstructed learners (notion and rate) is almost the same as in Hungary (Lernbehinderte). On the contrary, in England the entire population belongs to the same notion (children with learning difficulties).

Figure 2.8.



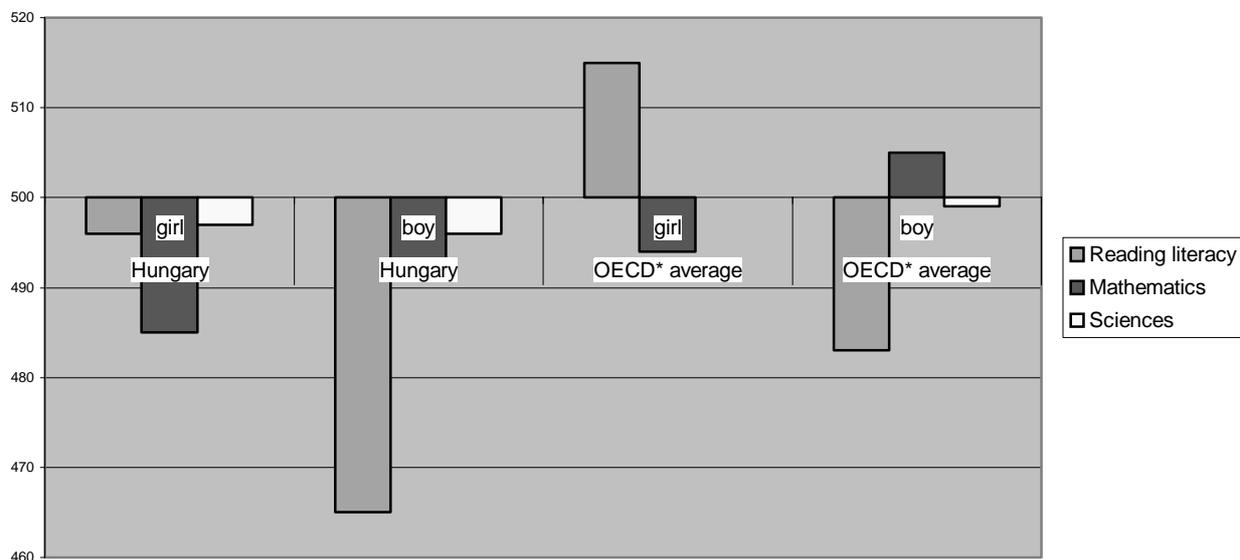
75. The legal conditions assuring the adequate quality of these special departments are lacking. For example, three out of four of the teachers teaching in special departments don't have a degree in special education, and in three out of ten schools there is no teacher holding a degree in special education. Still, only 1% of these schools with special departments use the help of outside experts. There are joint classes in over 80% of the special curricular departments with a large proportion of overage children. (More than one third of the children attending the lower elementary classes 1-4 are one or more years older than their fellows. (research from the last school bench program)

2.2.5. Gender

76. One of the important dimensions of inequalities is social gender. There is a historical reason for the differences between the two genders and to some extent the differences have remained up until today in all dimensions (income, status, power, prestige etc). Among the inequalities of modern societies it is education where the drawbacks of women are decreased most efficiently, moreover, the trends are expected to turn. In the last few decades two directions of change can be experienced in developed societies. On the one hand, girl's educational level is increasing. Significantly more boys participate in secondary vocational training aimed at receiving a profession, but in higher education the inner proportions have turned since 1995 and today more women start their higher education studies than men.

77. On the other hand, in the fields of basic skills and competences girls' relative performance (compared to boys') have also improved. Considering learning performance we can find characteristic differences between boys and girls. The authors of the study including the detailed analysis of the reading literacy performances of the PISA 2000 survey called our attention to the fact that boys' performances are lower than girls' in all countries (*Knowledge and Skills for Life, 2001*). Both in Hungary and in the OECD countries there is a significant difference in the average performance of reading literacy between genders to girls' credit. Considering mathematics, boys' performance is slightly better and practically there is no difference between girls and boys in the field of sciences.

Figure 2.9. The average performances of boys and girls aged 15 (reading literacy, mathematics and science) in Hungary and in OECD countries, 2000, PISA survey



Source: Molnár, 2002

78. If we look at the inner results of reading literacy tasks, we can see that in the course of reflecting and evaluation requiring a more complicated cognitive action, in the average of OECD countries girls reach a level 45 points higher than boys. The same difference in the field of simple search for information tasks is 24 points (*Knowledge and Skills for Life, 2001*). This difference – according to experts – can be influenced by the different kinds of reading habits of the two gender groups. Boys prefer comics, newspapers, magazines and websites, while girls prefer literature (novels). Half of the boys admitted that they only read when they have to. This rate is only 25% among girls (*Knowledge and Skills for Life, 2001*).

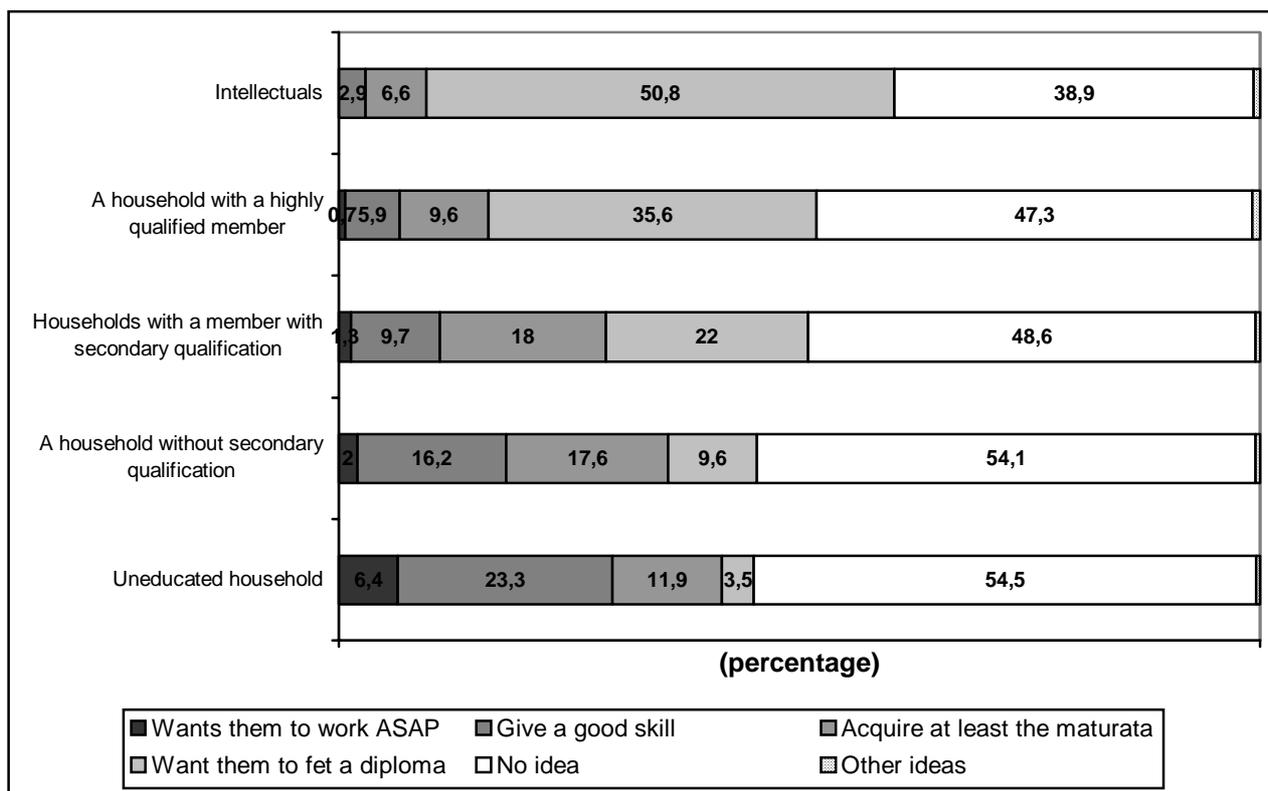
79. Considering the performance in mathematics and sciences, the gender differences are lower, and in these fields boys' performance is slightly better. In OECD countries boys' performance is on average 11 points higher, but only in half of the countries can we find a statistically relevant difference. In the case of science in six countries boys and in six countries girls performed significantly better. According to PISA results, there is also a difference between boys and girls regarding the learning strategies they prefer. Girls, opposed to boys, see themselves to control their own learning processes, but at the same time they are more likely to prefer memorizing procedures.

80. Nationwide a 20% point higher number of woman participate in higher education than man. In Hungary the woman-man proportion is 58-42%, which shows only a small scale variation regionally. The difference is the smallest in the central region (Budapest), where the rate of women is 8% higher. Since on the labour market and in incomes there are contradictory trends, the overrepresentation of women in higher education should not be regarded unfair. In the long run – presumably – this is the preferable trend.

CHAPTER 3. INTERGENERATIONAL TRANSMISSION OF INEQUALITY: THE ASPIRATIONS FOR FURTHER EDUCATION

81. Parents' ideas about the future of their children have a great influence on children's aspirations for learning and further education. According to the results of a study carried out among several thousand families in 2001 (The Changing Family, 2002), it can be stated that the majority of Hungarian families regard the schooling of their children to be very important and they are aware of the fact that without a qualification they do not have many chances for happiness and well-being. Almost 50% of the families participating in the research could not clarify their targets connected to education. However, as children progress with their studies, these targets become more and more concrete. Almost one fifth of the parents bearing an idea in mind think that their children should acquire a diploma and only a small rate of them prefer their children to become salary earners as soon as possible (see Fig. 3.1.).

Figure 3.1. The spreading of families with children according to their ideas about the future and according to the educational level of the family members, 2001



* Resource: The Changing Family, 2002

82. A research carried out in 1999 (Career Choice Aspirations, 1997 and 1999) clarified that the choice of school is the result of rational calculation of investment and returns, where the main aim is that the child's occupational (social) status should not be lower than that of the parents. The majority of parents are ready to pay all prices to fulfil this requirement and undertake all its risks – unsuccessful educational

career, the risk of investment without return. On the other hand, in the cases of other possibilities aiming at moving up the social ladder, parents inherently reflect upon risks and other forcing conditions when they calculate the rate of investment and return.

83. For parents with a higher occupational status, all options besides acquiring the highest qualification is simply “out of the question”. For parents with a lower status there are more acceptable options that serve as the basis of “real” calculation. Thus, family background has an effect on qualification, because the choice between educational institutions is a result of rational calculation where within the investment-return algorithm the need for avoiding going down the social ladder is such an important factor that it overwrites all other rationally calculated factors (*Sági, 2004*).

84. It is a fact that a lower rate of children of lower educated and poorer parents follow their studies in secondary and higher education than the children of better educated and better-off parents. Certain empirical research show (*Lannert, 2004*) that there is a dramatic difference between the children of mothers with a diploma and the children of less qualified mothers. Among 13-year-olds the latter group have a 114 times higher chance of choosing a vocational school than the former. The effects of the two parents are strengthened by one another. If neither parents has a maturata, than their kids have a 220 times higher chance for choosing the vocational school than secondary school. In the case of 17- year-olds, 80% of the children of mothers with a diploma intend to continue their studies, while in the case of mothers with a maturata only this rate is only a little bit higher than 50%. We can claim that the type and accessibility of the supply plays a role, but the distance of institutions have an effect on further education only in the cases of learners living in villages (mainly in the direction of vocational schools), because in their case further education – compared to the expected and reachable results – becomes very expensive due to distance. In the cases of urban children, the ones with better marks choose secondary schools more often than their mates in villages, which can be explained by the different performance content of marks given in rural and urban schools.

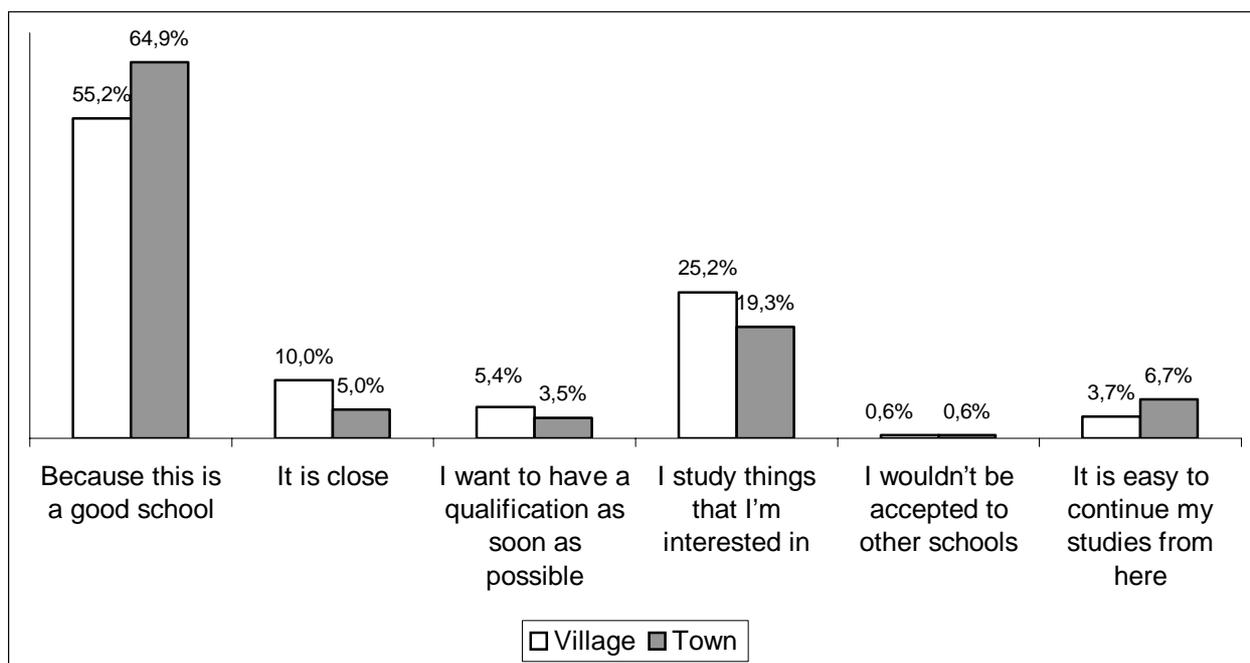
85. Many people thinks that the formation of differences between the aspirations for further education due to different family backgrounds can be put down to the fact that parents with lower qualification do not regard education as very important. Those, however, who suppose that rational calculations stand behind these differences, think that poorer families give up the education of their children according to a calculation of investment-returns (*Moksony, 1999*); however, in this case the income lost by the lack of education is not a result of consideration, but a result of constraint.

86. As we have mentioned earlier, apart from the cultural attitudes connected to family backgrounds there are costs-effects consideration that play a role in children’s choice of further education. The poorer, less qualified families are more sensitive to the educational performance of their children, i.e. in these families the educational performance of children has a greater influence on decisions about further education than in the case of more qualified families. It is sensible for them to undertake the extra costs of further education only if they are more confident about the future returns, which means that if the child has really good results, the risk of dropout is smaller. Consequently, the better results the child has, the smaller is the difference between the aspirations for further education of learners from families with different social background.

87. A research studying further education in secondary schools highlighted that secondary education is mainly chosen according to the quality of service and according to interest in the case of all the three school types. This means that learners, who have resort to the service, have a sufficient motivation for competing for the places in schools that offer better and more effective services. Converging pedagogic offers to the needs of clients is not necessarily contradicting quality.

88. The evening and correspondence training programs of secondary education are mainly designed for students who finished vocational school and they reach this group of learners. Learner motivation can be raised by the fact that by acquiring secondary qualification their position in the labour market improves significantly (opposed to learners with primary qualification, who need further studies for this). At the same time, the interests of institution can also be sensed, since these training programs enable institutions to keep their increasing surplus capacities (e.g. teaching staff).

Figure 3.2. The factors playing a role in the choice of schools for 13-year-olds according to settlement types, 1997. (percentage)



Source: Aspirations for career orientation, 1997

89. Most people with a diploma can count on favourable job opportunities and high income, which is highly motivating for participating in higher education programs. Despite previous expectations, the expansion of higher education did not lead to the devaluation of higher qualification, did not have a significant effect on unemployment for people with a university degree and on the profitability of higher education. On the contrary, the number of people with a diploma finding a job with high income has increased (*Semjén, 2005*). At the same time it is also true that the demand for adult education providing higher qualification is more unfavourably affected than the demand for professional training by the fact that it is a more an individual interest than the interest of the employer, so employees can hardly count on the support of employers. Since education is free of charge, here the lack of reduction of working hours can be considered problematic (*Györgyi, 2003*). However, the reduction of working hours could only bring partial results, since there is a significant rate of unemployment among people with lower qualification and unemployment is followed by work done in the “grey economy”.

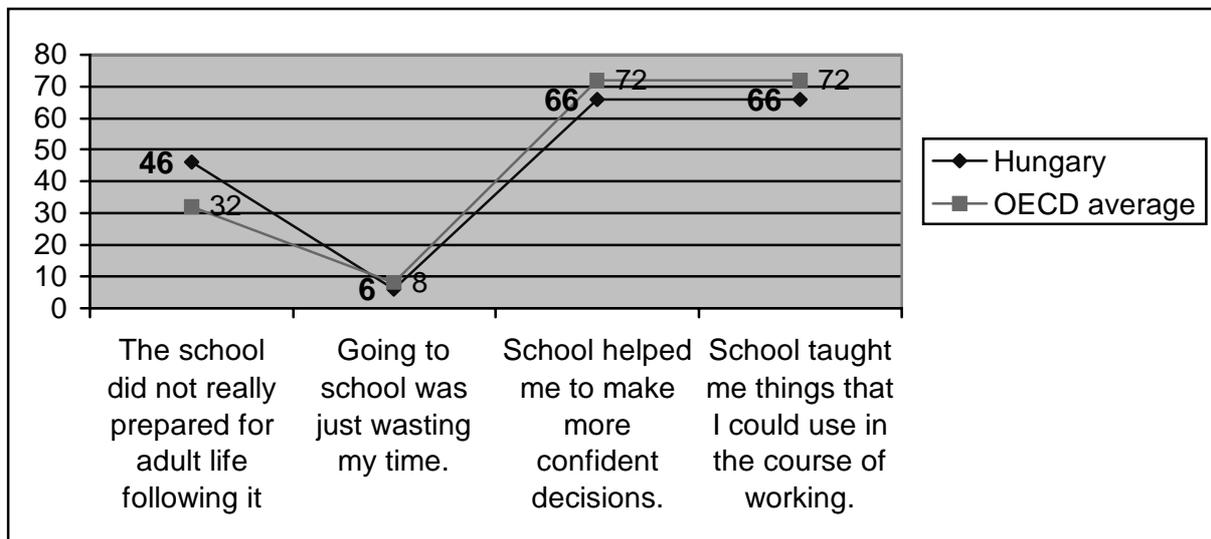
CHAPTER 4. UNDERSTANDING THE CAUSES OF INEQUITY

4.1. Motivation barriers

4.1.1. General education

90. According to the data of PISA 2003, a higher number of Hungarian students than the international average think that the things they learn at school are not relevant to them.

Figure 4.1. Learners' attitude towards school according to the PISA survey, 2003



Source: www.oecd.org

91. In connection to this, it is also has to be mentioned that Hungarian school directors complained the most about absence (56%, OECD average 48%). According to international studies, absence is considered to be the starting point of dropout and it can be characterised as one of the indicators of school failure. But if we match this with the fact that Hungarian learners have a more positive attitude towards their schools and classmates than the international average (Report, 2003), then we get the picture that considering the learner attitudes towards school, being together with the age group and friends proves to be a very important factor. It can be seen that schools where there is constant communication between parents and teachers and they agree on basic values, moreover, they react according to these values, this norm protect children to drop out from these schools before finishing it. Alternative or religious schools can often be characterised by this strong norm, which undoubtedly has a positive effect on the pedagogic work going on in these schools.

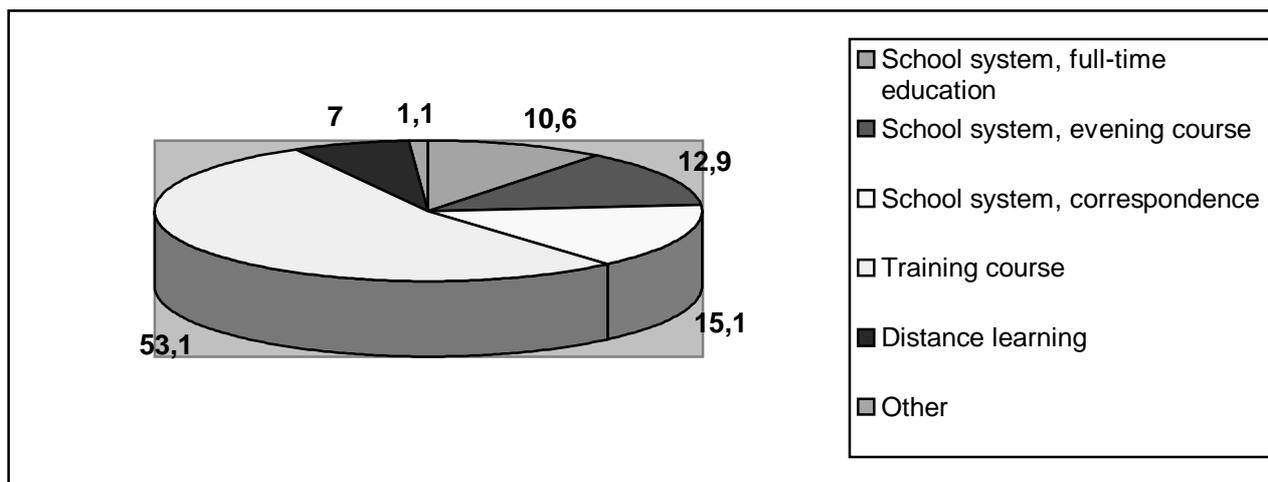
92. The strongly culture dependant nature of learner performance is justified by the data of the PISA survey, since learners' achievement in Hungary did not only correlate with the educational level of parents, but even stronger, it correlated with the cultural assets of the family (*PISA 2003*).

93. During the last decade there has been several changes that emphasised the problem of sufficient learner motivation and strengthened the need for the development of pedagogical culture. Thus, for example, the expansion of secondary schools was great. As a result of this, a high rate of learners started secondary school without an interest for academic, theoretical studies. Besides, in vocational training postponed after the age of 16, the academic character started to dominate oppressing practical orientation. As a result of this the number of learners with low motivation, behaviour and learning difficulties increased. Beside these special problems there is a general international and national tendency that many learners have negative attitudes towards schools and school subjects. In Hungary neither teachers, nor institutions are prepared for dealing with these problems and they did not succeed in creating programs and in organising learning in a way that a high quality education of low motivated, unprepared and mainly socially disadvantaged learners could be provided (Lannert, 2002; Liskó, 2002).

4.1.2. Motivation for learning outside the formal educational system

94. Since in the course of participating in the formal educational system the emphasis is laid on acquiring some kind of qualification, outside the school system the possibility of gaining professional or language competences is becoming important. It is a well-known fact that there is an increasing demand for courses outside the educational system and it can also be stated that it exceeds the demand for programs offered by schools. But at the same time, 40% of the adult population would choose the form of learning connected to schools (See Fig. 4.2.).

Figure 4.2. What system would you like to choose for learning? (2003)



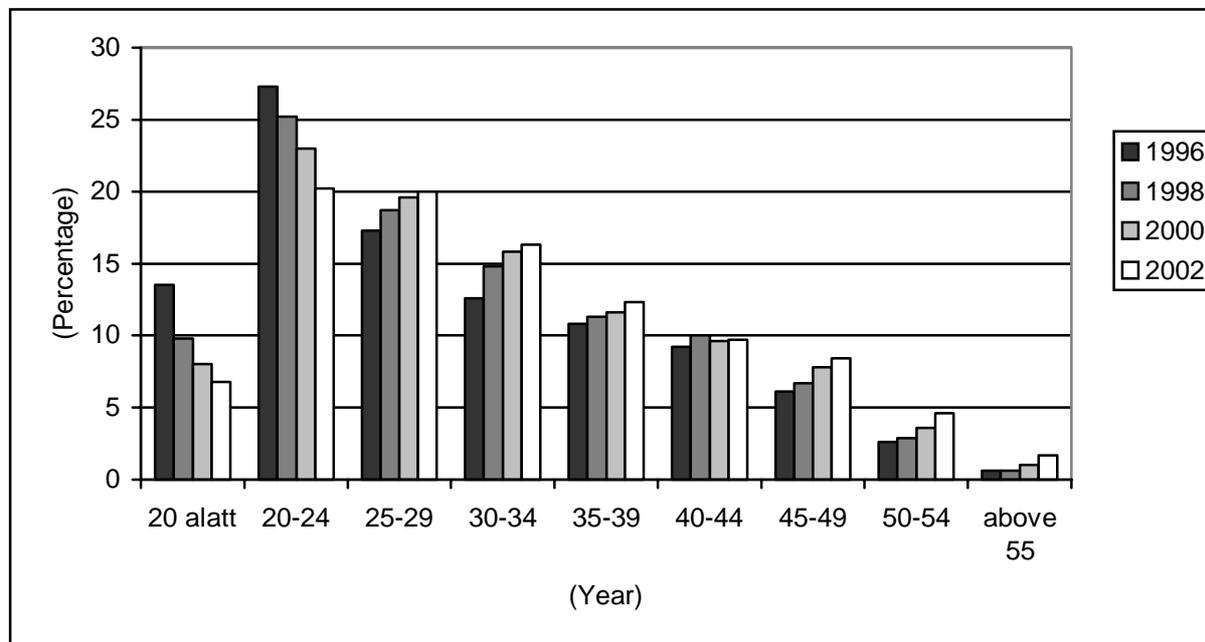
Source: Györgyi, 2003

95. Most probably, this reflects the lack of trust towards the institutions providing courses outside the educational system or towards the entire system. Looking at it from a different angle, however, this means that the educational system has a great credit that is not being utilised. According to a public opinion poll about education carried out in 2002, the willingness and activity of learning is strongly connected to qualification. Among people asked, there is a much higher number of people with higher qualification who study or plan to study than in comparison to those with lower qualifications. (Report, 2003).

96. The participation in training courses decrease parallel with aging. Data reveal that especially the age of 50 proves to be a border for learning and below that age the amount of learning strongly depends on former qualification. In connection with this, research results show that the social strata with lower

qualification regard themselves too old for learning at a younger age, which –besides other factors- implies the importance of maintaining learning strategies and skills (Györgyi, 2002).

Figure 4.3. The division of people starting training courses according to age groups (per cent)

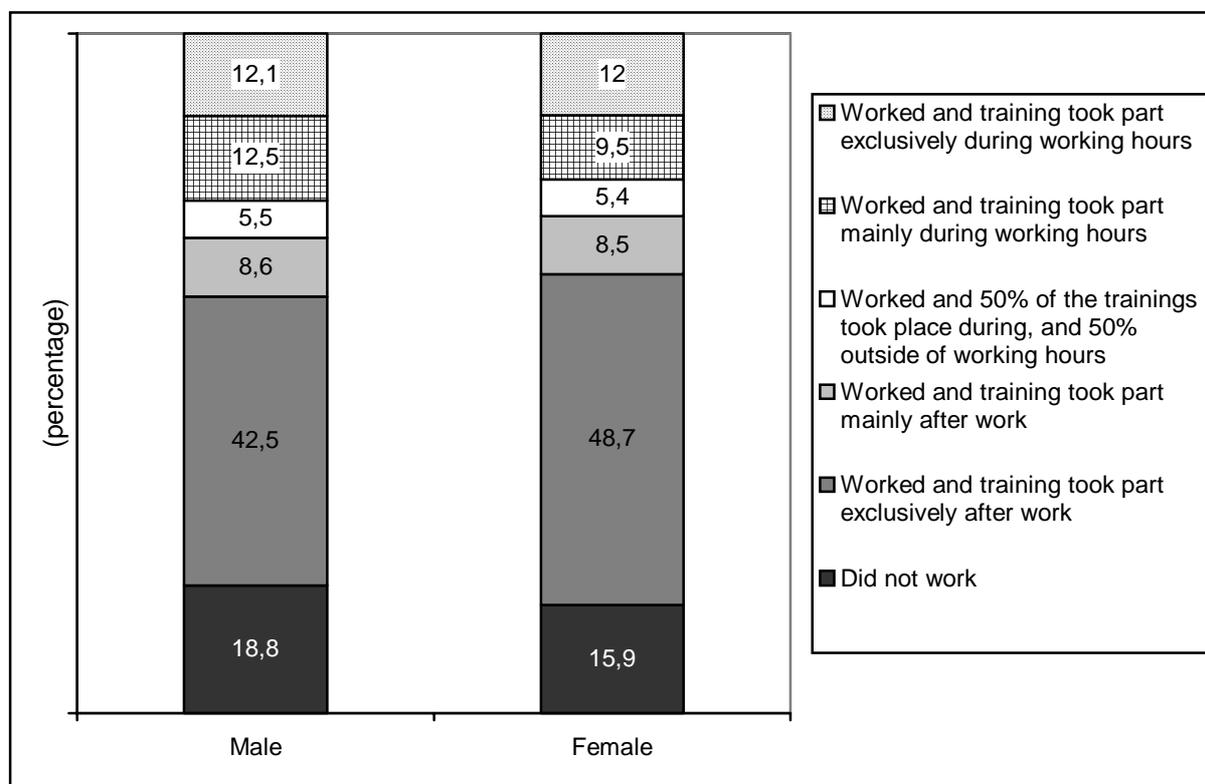


97. The higher rate of participating in adult education is blocked by several different factors and these reasons depend on social status:

- For societal groups with lower qualification in many cases learning is not an inherent part of life strategies, but it serves as the direct means of finding a job. Their motivation is fundamentally determined by the fact whether they can start working after finishing their studies.
- In the case of middle-classes participating in training courses with a larger number of people the main obstacle for learning motivation is the costs of learning, but also the lack of time.⁴ The supply of training courses generally suits them; however, they rarely undertake courses that would require more energy (e.g. language courses).
- For highly qualified adults working in managerial positions the lack of time is also a big problem, but this group gets a significant support for learning from their employers, which shows that their employers expect them to develop themselves constantly. The same can be stated about a small group of skilled workers (Györgyi, 2002).

⁴ Under this notion we mean people with a secondary qualification who are not unemployed, but people with a diploma not working as managers can be characterised similarly.

Figure 4.4. The division of employees participating in trainings outside the educational system according to timing and gender (per cent)



98. More than half of currently employed people (55%) participated in training courses mainly after work, 17% of them did not work temporarily during the course and less than 25% said that their working hours were reduced significantly during the course. Most probably with the increase of supporting their employees, employers could motivate a higher number of people to join continuous learning, because besides financing the factor of working hour reduction is very important if someone works and studies at the same time. But naturally, the precondition of this is the strengthening of employers' interest.

4.2. Institutional barriers

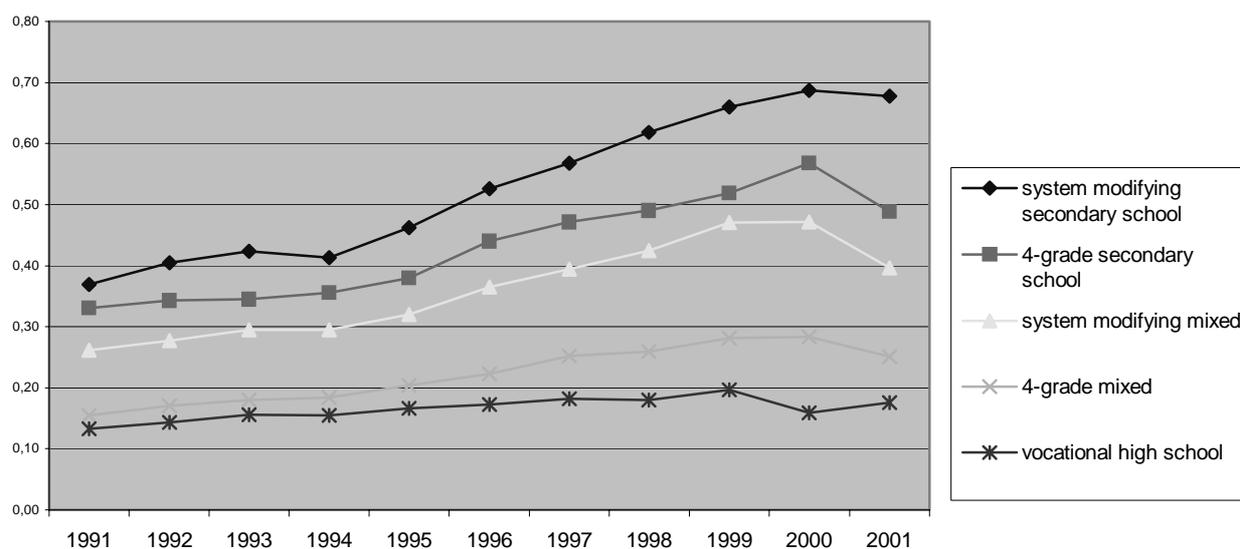
99. Within the Hungarian education system in the course of strong selection mechanisms, such homogenous environments are being produced at schools, which –through the effects of the age group – strengthen the already existing advantages or disadvantages. The differences between primary schools in Hungary were rather big even in the 70s, often bigger than justified by regional differences (*Csanádi-Ladányi, 1983*). According to the results of the IEA survey in 1970, in lower primary level in Hungary the differences between schools measured by the percentage of learners' performances were 1.5 times higher than the international average, while in higher grades the difference was around the average (*Báthory, 2000*). This shows that selection happens in European countries as well, but only in higher grades, whereas in Hungary, the lower grades are segregated as well. The most dramatic results in this respect were produced by the PISA 2000 survey mentioned earlier.

100. The high scale selection within the educational system often happens under the title of "differentiation". In Hungary the primary school divisions operated in a similar way. The form of selection covered under the title of differentiation was revealed by many researchers (*Ferge, 1980, Csanádi-Ladányi, 1983*). Since the 70s many things have changed. While at that time the children of the elite

concentrated in the music divisions of primary schools, by now this role has been taken by language divisions. The strengthening way of this kind of selection at the beginning of primary school is proven by the fact that in the mid 90s an increasing number of primary schools organized entrance exams for first graders (*Report, 2000*), and it is also proven by the fact that in regions where district boundaries were erased the children of families with a lower social status were more excluded from popular divisions (*Lukácsy, 1997*). The most extreme form of selection within the educational system, the segregation of Roma learners, has been outlined earlier in this report.

101. The increasing differences among institutions are also demonstrated by the annually published ranking of secondary schools. Regarding the rate of learners accepted to higher education, the distance between the groups of the most and less successful schools grows year after year (see *Fig. 4.5*). The fact that the expansion of secondary education was followed by the increasing difference between the groups of the most and less efficient institutions proves the strength of selection mechanisms. Since the mid-90s the rate of students following their studies from the so-called structure-changing general secondary schools (with 6 or 8 grades) have increased, while vocational high schools seem to fall back.⁵

Figure 4.5. The rate of learners accepted to higher education from different types of secondary schools, 1991–2001 (%)



Source: The calculation of Judit Lannert based on the OKI-OFFI database created by Gábor Neuwirth

⁵ However, we have to call attention to the fact that the system modifying secondary schools – since this form of education spread at the beginning of the 90s – sent out their first graduates after 1996/1997. At the same time, in the OKI-OFFI database the secondary schools initiating this kind of programs are ranked as system modifying institutions for the previous period as well. Therefore, between 1991 and 1995 the indexes of these schools indicating the rate of learners accepted to higher education show the results of students participating in the 4-grade system. In this period, these indicators are a little bit higher in these institutions than in other secondary schools. But in the mid 90s these indicators started to improve suddenly. This could imply that this form of education is much more efficient, but the more realistic explanation is the fact that the new form of training strengthened the selection mechanisms and schools could significantly improve the level of their learners.

102. Inequalities seem to grow in other dimensions as well. Looking at the results of the standard written entrance tests, the differences between the average of the schools with the best and the worst results seem to increase. The difference between the counties with the highest and lowest acceptance rate increases year after year. The average results of written tests also prove regional polarisation. In the course of the last 10 years, the counties of South and West Hungary have the best results, while the counties of North –Hungary have the worst (*Neuwirth, 2003*).⁶

103. Considering secondary students' chances to get into higher education, a considerable polarisation process could be seen during the 90s, which process seems to be strengthening in the second half of the decade. This trend can be explained by the fact that the combination of learners in secondary schools is significantly different and these socio-cultural factors have a strong correlation with the type of settlement where the institution is located, with learners' chances to get into higher education and with their average results in written entrance tests. There is also a linear correlation in all dimensions between the family background and success in getting into higher education of learners from different school types in different settlement types. From bigger settlements towards the smaller ones and from structure-changing secondary schools through 4-grader and mixed secondary schools to vocational high schools we can find a decreasing tendency considering both the parents' qualification and the rate of admission into higher education (*Lannert, 2004b*).

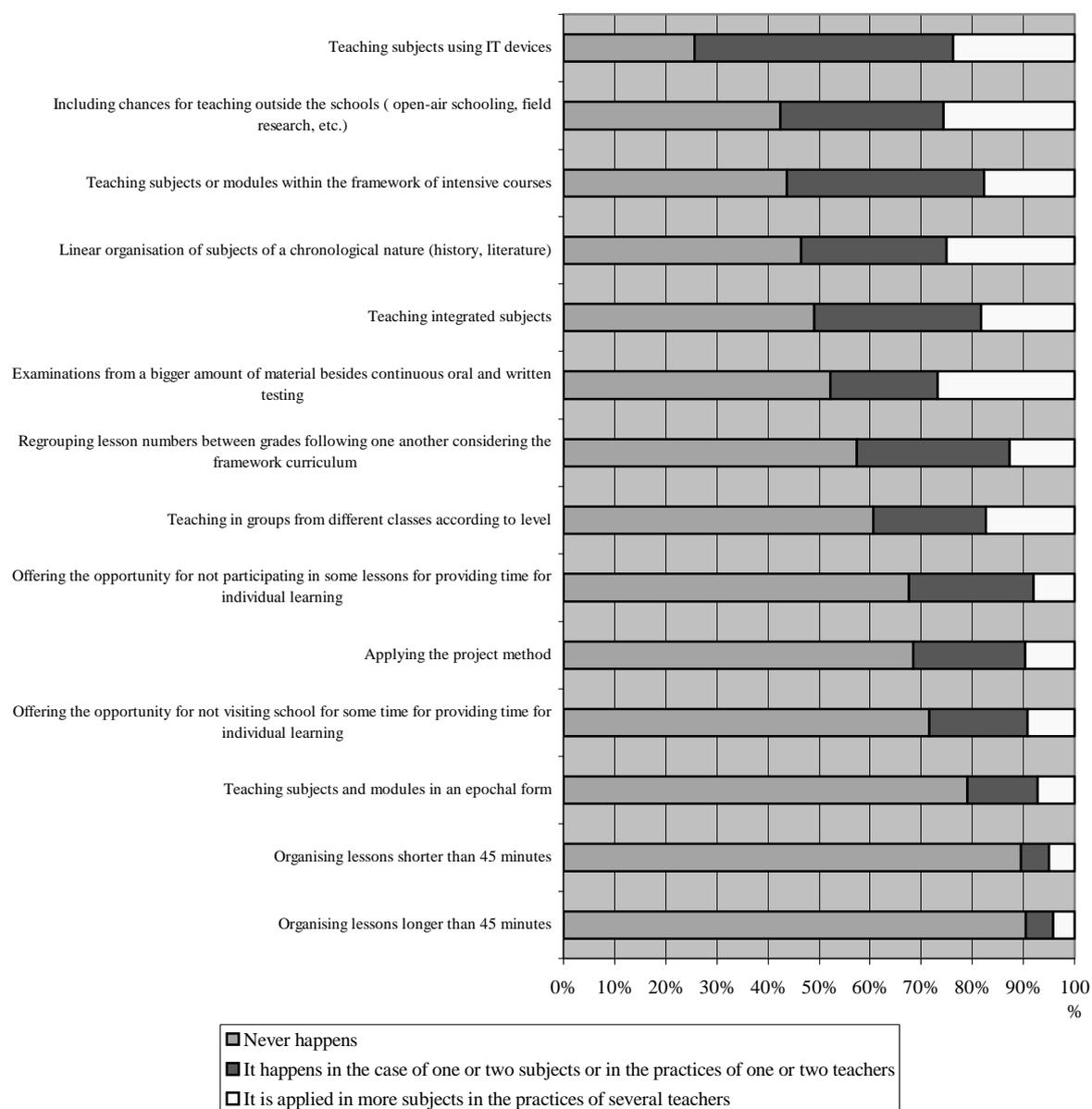
104. Education system is a caste system, where inequalities are realised in all dimensions – moreover, to the same direction – and these dimensions do not weaken but strengthen the effects of each other. In bigger towns and in secondary schools we can find a stronger correlation between family background and the indexes of continuing education, but the vocational schools of smaller settlements produce the same correlation. In the group of secondary schools a linear hierarchy can be outlined, where considering learners' socio-cultural backgrounds, learning performances and chances for getting into higher education the system modifier secondary schools maintained by churches in big towns prove to be in the best and vocational high schools of small settlements maintained by the municipality or the county proved to be in the worst situation. Between the two extremes the other school types can be clearly placed according to the different dimensions. We can claim that the segregation of the school system has become extreme and the inequalities between schools seem to deepen opposed to the expansion in the 90s.

4.3. Quality (pedagogical) selection

105. Naturally, structural selection and the inequalities of quality indicated by different learning performance data are interdependent, while typical learning routes are connected to learning performance. In the case of structural selection we speak about the strong correlation between learners' social background and the school types available for them and the learning routes. The reason for the inequality of quality, i.e. the strong correlation between the performance and family backgrounds of children going to the same schools – apart from effects from outside the school – is mainly the non-differentiated practices of pedagogy, the teachers' expectations according to the social background of students, assessment and teaching, so the problems connected to the quality of teaching and pedagogy. Pedagogical practices strongly influence the extent to which structural inequalities are turned into the inequalities of quality as well (*Radó, 2000*).

⁶ The tendencies and detailed ranking of schools are published in Gábor Neuwirth's annual publication of The Indicators of Secondary Education and the data can also be reached via the Internet.

Figure 4.6. Organising content and teaching in schools, 2002 (%)



Source: Simon, 2002

106. Within Hungarian pedagogical practices frontal teaching has a long tradition, and teaching based on memorising previously prepared materials and evaluation comparing individual achievement to the class's "social average" is not only incapable of being adapted to the individual pedagogical needs of children, but it also strengthens the effects of them revealed in different learning achievements. Nevertheless, it seems that in lower primary education pedagogical practices can be characterised by some variability considering the organisation of teaching. Even if frontal teaching can be still regarded as the most general method, there are fewer teachers who apply this method exclusively. In observed classes, considering the frequency of other methods, frontal work is followed by group work, individual work and the rarest form is pair-work. It can still be stated that a great proportion of teachers still share the belief that

frontal teaching is the best way of teaching “everything to everyone”. Characteristically, teachers do not connect differentiation with increasing the efficiency of their work (*Report, 2000*).

107. In summary, it can be claimed that most Hungarian schools are incapable of compensating for the negative effects of social drawbacks on learning performance by the means of applying pedagogical methods and of organising teaching. As a result of this, the existing differences in the fields of socio-economic, socio-cultural and personal skills are transformed into educational failure during the years spent in education. This problem is critical during the first phase of education, when the chances for compensating disadvantages would be the biggest.

CHAPTER 5. ACTIVE EDUCATIONAL POLICIES BEARING ON EQUITY

5.1. The systemic conditions of policy making and implementation

108. One of the “bottle-necks” in creating strategies connected to the educational sector is the weakness of co-ordinating government and sector policies. In spite of the richness and variability of policy coordinating mechanisms, the form, content and intensity of governmental, e.g. strategic cooperation between ministries, still intensively constrain dealing with the problems of some sectors (in this case: the public servicing systems supervised by certain ministries) adapted to realistic situations and adapted to the inherent logic of the targeted problems and it still constrains the coherent and harmonised application of the essential system of instruments. Besides, reaching the targets of strengthening equity is also complicated by the decentralisation of the Hungarian educational system, the instruments of direct governmental intervention at school level is strongly constrained, the system of instruments for indirect strategic control has not been formed yet.

109. One of the first conditions of decreasing inequalities is an available educational information service which enables the identification of learner target groups and the institutions educating them. This is important for the sake of providing extra financial resources, services and development to the right target group. The currently existing Hungarian information system does not make this possible, because only the first steps has been taken of building the statistical systems capable of following learner routes and identifying the learner target groups. As a result of this, the different extra subsidies are not utilised in an efficient way. At the same time, cost-effectiveness and efficiency of programs would be supported if they were systematically monitored and their efficiency would be examined and also essential feedback would be given according to the results.

110. Another important element is a measurement system of pupils’ achievement that would provide a mirror for schools in the sense that it would offer feedback for them about the effectiveness and efficiency of each school. In the course of creating this system, extra attention should be given to the effectiveness of educating children with a disadvantageous background, endangered or requiring special care. The current Hungarian, quite extended learner assessment system so far has been a formative system based on informing teachers’ assessment practices, which is not capable of being published, so it is incapable of enforcing the requirements connected to the efficiency of schools. Since the identification of institutions underachieving is not enough in itself, according to the practices that proved to be effective in many countries it would be essential to provide the schools with so-called interventional development programs. Currently, the legal and financial conditions of this are lacking. Similarly, the system of institutional self-evaluation and that of external evaluation can not serve the targets of equity in an efficient way. The system of institutional evaluation is not based on a nationally unified set of aspects; its regulatory and methodical background is incomplete. Thus, for example the evaluation of teachers’ performance is not a general practice in Hungary, and insufficient pedagogical work – considering equity as well- has practically no risks.

111. Another applicable set of educational policy instruments is the operating innovation; in Hungary it could be the spreading and structural extension of the knowledge accumulated in experimental models aiming at educating groups constrained by different disadvantages. The most important condition of this is the external evaluation of the different innovation programs, which at the same time would serve as the examining of the efficiency and applicability of these programs. The instruments successfully applied in

other countries for spreading operating innovation is supporting the horizontal learning between schools, networking institutions adapting certain programs and making resources and professional support available. This type of development programs are not unprecedented in Hungary, several institutional innovations were domesticated in Hungary through the operations of institutional level networks. Even though, successful school programs are still operating closed into innovative islands and they do not have an effect on the efficiency and equity of the entire educational system.

112. The next system of instruments, which is quite complex in itself, is the more widespread utilisation of instruments supporting transmission between education and the world of work. These are for example the career orientation services or modular vocational training. The expansion of the supply of adult education is also connected to this together with easing the accessibility of these programs and with the application of motivators connected to these programs. This system has to provide for citizens that in any phase of the life cycle, having any kind of problems they should be able to join learning and thus to gain ability to adapt to changes.

113. One of the increasingly appraised elements of education policies intended to decrease inequalities within the member countries of the EU is supporting the integration of different learner groups and supporting the formation of a more integrating educational system. For example, reintegrating segregated Roma children or the integration of moderately mentally challenged children also belong here. It would also be important to utilise the social subsidies connected to education in a much more effective way than today. In international comparisons, this system in Hungary -considering both the resources of its elements and the volume of the financial resources spent on it – can be claimed as good. (This way for example in the 2005-2006 school year 50% of children participating in general education receive a significant amount of subsidies for buying their textbooks.) All the same, the principle of need should be strengthened and the connection between educational and social targets should be narrowed down.

5.2. Educational policy initiatives

114. The Ministry of Education's mid-term development strategy for general education, which was accepted in 2003, claims that one of its main aims is to decrease educational inequities. In this aspect, the strategy focuses on *integration* and *pedagogical preparation* within its system of aims. This partly means the decreasing of Hungarian education's selectivity and partly dealing with the pedagogical and quality problems causing segregation. The concrete targets of the strategy for strengthening equity are the following:

- ceasing the practice of schooling different learners into institutions with basically different educational aims at a very early stage of education;
- providing the right for the equal opportunity for quality education and ceasing the obstacles for enforcing this right;
- developing pedagogical practices at schools in a direction that strengthens schools' ability to compensate for social disadvantages and spreads differentiated and integrating pedagogical and didactic culture;
- the development and spreading of effective instruments fighting educational failure and dropout, including the expansion of institutional possibilities for differentiated progressing and for close-up, moreover constraining the application of failing and forcing for class repetition as a pedagogical instrument;

- the formation of a legal regulation which is capable of eliminating segregation and the utilisation of other more concealed forms of separation and which can stop operating educational processes decreasing career chances;
- connecting instruments within and outside education policies (labour and social policies), the development of social caring systems within the schools based on the principle of need;
- using international and national financial resources for the development and spreading of new school models serving the elimination of differences, with special attention to the school of “second chance” and to new educational forms supporting transition between education and work;

115. The realization of these targets is supported by several different initiatives of education policy. In September, 2003 the 1993./LXXIX. law on education was modified. A great deal of alterations were proposed for the sake of the integration of children and learners at a disadvantage. Thus, for example, the law was enriched with anti-discriminatory elements (§ 4. and § 84.), which supported schools and municipalities in finding solutions for organizing education that are lawful and serve the harmonized cooperation of all participants involved. (The first court case with the charge of educational discrimination against Roma based on the regulations started in August, 2005 against the municipality of the town of Miskolc.)

116. The notion of integrating preparation (on grades 1, 5 and 9) was initiated in November, 2002. Starting in 2004 the budget law ordered a HUF 60,000 extra normative to this regulation. The target group of the integration normative are children whose parents have 8 grades or less qualification and who are entitled to the Ft 4,600 childcare support due to their financial situation. Integration is not aimed at an ethnic group, but there is a high rate of children receiving these subsidies from the Roma ethnic minority. (Only a little bit more than 20% of children at school fall into this category and 80% of them are Roma.)

117. The integration and skill evolving development of children with special needs must be done according to the orders given by the minister of education in his official statement titled: „The pedagogic system of integration and skill evolving development of children with special needs” According to the Integrational Pedagogic frame system, institutions applying for per capita must create a strategy for integration, prepare for school enrolment, build partnerships and use the tool system supporting the process of teaching and learning. According the minister’s official statement, the institutions must prepare an introductory action plan for the initial two years together with a number of other prescribed documents. These documents aim at describing all the characteristics of the institutions involved. Experts in general agree that the „The pedagogic system of integration and skill evolving development of children with special needs” served as a successful tool for the development of school and pedagogic practices.

118. Since in Hungarian educational policy the questions of equity and pedagogical quality are strongly connected, those initiatives also have to be mentioned that – using the expression widespread in Hungary - are aimed at the realization of changing pedagogical paradigm. These initiatives are focusing on increasing the efficiency of the first phase of education (the first 4-6 years) and on the development of basic study skills. Here belong for example the gradual initiation of written evaluation instead of marking, postponing teaching subjects and curricular reform. The latter (the modification of the national curriculum) is supplemented by a large-scale modular pedagogical program development, which is aimed at creating complex pedagogical systems that can easily be adapted by schools.

119. The reform of the maturata exam effective from 2005 is partly meant to strengthen the equity of education. The former maturata taken at school level and the entrance exams to higher education were partly substituted by a central standard state exam. Its requirements have also changed; the former exams

mainly measuring lexical knowledge were substituted by an exam designed for measuring the most important competences. This did not only strengthen equity in education in the field of getting into higher education, but it is expected to have a positive effect on the pedagogical work of the last two years of secondary schools.

120. As extra-curricular foreign language education is only available for the well to do middle class families, the first year the new maturate exam was introduced, the educational equity of the exam system was weakened by the extra points offered for foreign language exams. The Ministry of Education has already announced the correction for the disproportionately calculated points.

121. In 2005 the government accepted the vocational development program, which includes many direct and indirect elements to strengthen access to equal opportunities. These actions main goals are to decrease the number of drop-outs in vocational schools and to strengthen the market position of qualifications acquired by students facing disadvantages.

122. The first steps of strengthening equity in tertiary education were taken in 1998, when the modification of the law ceased the tuition fee initiated in 1996, thus making the acquisition of the first diploma free of charge. The second important modification of the law regards to equity was the initiation of the student credit system, which entitled students studying for their first diploma for a maximum HUF 21,000 per month preferential, state subsidised credit.

123. During the reforms of higher education initiated by the current government, the considerations of equity were highlighted. This was mainly considered in connection with the development of the student subsidising system, which was intended to create independence between starting tertiary education and one's financial situation. The reformation of the subsidiary system has not been finished yet. The new law on tertiary education only regulates the rights for tertiary education for free of charge or for discounts. In higher education the most important initiative having a direct effect on equity is a government decree coming into effect on 1 January, 2005 (269/2000 19/A. §) on the positive discrimination of those at a disadvantage. This regulation claims that:

“(1) The disadvantaged applicant who is accepted to a place with a tuition fee can receive permission from the Minister of Education for the continuation of his or her studies within the state financed programs – within the period of time defined in the requirements of the given faculty – according to the ranking created for students within the entrance examination process.

(2) If the higher education institution does not launch a program with a tuition fee, within the framework of a mentor program organized by the Ministry of Education the institution, according to the total points reached by the applicant during the entrance examination process, accepts that applicant at a disadvantage, who in the given institutions, faculty reached at least 80% of the amount required for the state-financed places but not less than the total points regulated by this decree in § 7. 8 paragraph (4).” Above the maximum number of students in the major or majors only 3% of the students can be accepted this way. Those students are classified as disadvantageous, who during their secondary education were living in public children's homes, whose family received subsidies for upbringing on a regular basis, who received extra family allowances, whose parents or guardians have only finished the eight grades of schools. The preferential regulations involved in the decree are supplemented by developmental and supportive instruments. The most important of these is the Mentor program initiated by the Ministry of Education.

124. One of the basic requirements for strengthening access to equal opportunities through education is the reform of the teacher profession and the skills development of teachers. The law on higher education

aims at switching to the „bologna system”. One of the elements of this comprehensive reform is the structural change of teacher training and the reform of the related output requirements. The idea for a new training requirement system puts greater emphasis on the development of professional and methodological skills (in support of differentiated and personalized pedagogical practices) and on the preparation of teachers teaching students with different backgrounds to meet their individual learning needs. The idea in general focuses on the promotion of access to equal opportunities. The practical involvement of these requirements in the system of higher education may be a result of a longer process.

125. Although equity (decreasing inequalities in education) is a persistent priority of education policy the effective setting of priorities and their implementation have serious constraints. One of these is the lacking independent evaluation of different initiatives and target programs of educational policy. As a result of this, correction rarely happens within one governmental cycle and the new governments have to make decisions about continuing or ceasing certain programs according to insufficient information. As a result of the “stop and go” cycles of different governmental cycles, several initiatives do not achieve an age when they could have durable effects on the targeted inequalities.

5.3. Targeted government programs

126. Decreasing inequalities in education is supported by several programs initiated by non-governmental organizations, local and regional municipalities and international organizations, but these reach further beyond the extent of this report. In the following we provide an outline of programs initiated by educational administration mainly subsidised from the budget or from EU funds supplemented by budget resources.

127. The aim of the *Arany János Support Program for Gifted* initiated by the Ministry of Education is to support talented students living in small settlements and to provide the educational service and access to these services for making the most of their talent. The program is not only aimed at the expansion of accessibility, at working out sustainable pedagogic practices and at the adaptation of those into local programs, but it continuously provides the professional and supplementary activities necessary for the successful realization of development programs, provides the sufficient pedagogical expertise and institutional framework. The most important elements of this background work are the maintenance of professional servicing, the organization of necessary training, the continuous operation of measurement and assessment system worked out for the program, financing student scholarships and institutions. The program is operated for successfully preparing students for tertiary education. In order to fight disadvantages, a special central program was worked out under the control of the Ministry of Education, which is adapted by the institutions participating in the program. The program encouraging talents lasts for five years, the four years of secondary education is preceded by a preparatory year. The aim of this preparatory year is to decrease the drawbacks: close-up, psycho-social support, the development of creativity, moreover an increased number of English and IT. Besides secondary education learners participate in personal development, study skills and communication training courses in small groups where special methods are being applied. By the end of the secondary school, students have to take a C-type intermediate state language exam and the international ECDL exam of IT skills. The program is realized with the involvement and real cooperation of the partners. Students are being proposed by municipalities according to the suggestions of their primary school teachers following the application requirements of the Ministry of Education. In the programs all talented, creative students can be nominated who live in a settlement with less than 5,000 inhabitants and whose family's financial situation does not enable them to continue their studies in a secondary school. The municipalities delegating students provide a HUF 5,000 monthly scholarship for the students. If the municipality can not afford this, the scholarship is paid by the Ministry of Education. The secondary schools participating in the program were selected in the course of a tender. Secondary schools could only apply for launching classes for talents with a special program in a consortium with student hostels. The institutions were obligated to build in the special talent

building and drawback compensating developmental targets and activities into their pedagogical programs and local curriculum. The financing of the institutions happen through the system of normative financing. In the 2001/2002 budget year the government provided a double normative for secondary schools and hostels participating in the program. Starting from the 2001/2002 school year the program was supplemented by a special program for Roma. In three hostels for Roma an annual number of 50 Roma learners could start their preparation for tertiary education. (*Loboda, 2002*).

128. Since then, the Roma sub-program of the program was closed and a new boarding school program was introduced in 2003, called the Arany János boarding school program. The eligibility for this program is not based on ethnic, but the child's social background.

129. The *Phare program* supporting the integration of extremely disadvantaged –mainly Roma – young people initiated in 1999 intends to improve the situation of Roma young people through the instruments of education. For the sake of this it supports the development and realisation of programs that improve the chances of disadvantaged Roma youth to get a job after leaving the educational system. The program intends to solve the problems of the educational inequalities of children with drawbacks in a complex way with different basic programs and instruments designed for the different levels of education. The novelty of the program is that it does not set its targets according to school types, but in the fields of the entire system where the development attached to certain targets can be realised. Another new element is that only consortiums can apply for the basic programs. According to the experiences of foreign countries, this type of school partnerships can be more effective in solving the complex problems of children at a disadvantage and they have a bigger chance for maintaining the results and long-term effects of the program. The organisations willing to co-operate in the course of the program sign an agreement where they clearly state the duties and responsibilities of institutions and organisations. (*Loboda, 2002*)

130. The laws on general education and on equal opportunities created the conditions of integrated education.⁷ The enforcement and realization of the law's regulations require several years' or decades' of development and investment. Between 1999 and 2002 these developments were significantly supported by certain programs of the National Public Foundation for Integrating Children with Special Learning Needs. The most important programs supported by the Public Foundation are the following: training courses for parents and carers designed to provide a supportive attitudes in families, programs aimed at early recognition and development, improving the personal and material conditions of integrating schools, improving supportive services, e.g. a network for travelling conductors, swapping information, supporting regional partnerships and organising integrated camps (*Mesterházi, 2002*).

131. The Budapest Public Foundation for the Development of General Education initiated its *Mentor program for the further education of Roma learners*. (However, the program is not a national level initiative; it served as a model for several national and municipal programs.) The aim of the program is to provide support for 7 and 8 grader Roma learners thus enhancing their further education. Teachers applying to the program undertook the obligation of helping more and more learners into secondary education. For the sake of this, teachers as mentors deal with a maximum number of five learners separately after school. In the application form parents also signed with their signatures that they agree on the fact that their children occasionally stay at school in the afternoon participating in extra activities. For this job teachers receive a HUF 5,000 monthly scholarship per student. The foundation provided an annual HUF 5,000 per student for programs outside the school, which could be utilised freely by teachers. So far 440 learners participated in the program and one teacher dealt with an average number of 3.8 learners (*Lafferthon-Mendi-Szira, 2002*).

⁷ 1998. year XXVI. Law on handicapped people's rights and equal opportunities.

132. In 2005 the government launched a new scholarship program called: „for the journey” (Útravaló) through which disadvantaged children and students showing special interest towards sciences, technology and mathematics can apply for support. One of the main goals of the program is to establish the necessary educational requirements for the successful social-economic integration of children coming from poor, less competitive families.

133. The already available sub-programs of the scholarship program are the following: „the path to secondary school”, „the path to the maturata”, „the path to a profession” and „the path to the scientific world”. The program does not merely offer scholarships, but likewise to the programs of the Budapest Municipality and private foundations, it makes the remuneration of mentors possible.

134. Following the initiative of the Minister of Education, in 2002 they started to work out the program of a national network to be created for supporting the educational integration of Roma children and children at risk. Parallel with this, in the Ministry of Education, in the office of the ministerial commissioner responsible for the integration of children at risk and Roma children, they worked out the regulations for two new forms of education, the ability deployment and preparation for integration. The main activity of the National Integration Network is to provide professional support for the initiation of integrating teaching in more and more institutions and to build up a professional network based on the horizontal co-operation between institutions and teachers. The Network chose 45 primary schools (“base institution”) from four regions (South-Dunántúl, North-Hungary, North-Alföld, Central-Hungary) in the course of an open tender, which provide a model for the creation of the organizational and pedagogical content of integrated education. A consultant and small regional co-ordinator was provided for all institutions, whose main duty was to support that the inner professional development of “base institutions” (the building of a model for integration) and the services provided for other institutions (spreading integrating attitudes) should be realised constantly.

135. Among the programs financed by the EU’s Structural Funds the most important ones are the central programs under the title The training of professionals involved in the education of children at risks, especially Roma learners and children with special needs and the development of educational programs connected to integrating education (with a budget of HUF 3.5 billion), and the program named The preparation of teachers and educational experts for competence based teaching and training (with a budget of HUF 7.2 billion). The central development programs are supplemented by funds accessible for institutions through direct tenders, so connected to the total HUF 10.7 billion central funds there are HUF 15 billion available through tenders all over the country. The main target of the development programs included into the central program aiming at children at risk is to create an integrating school system and pedagogical environment, where real integration is realized and learners with different backgrounds are being educated together, where the school and the teacher adapt to the social, cultural and mental differences of learners and to the diversity of their learning needs.

136. The program has two main components: (“A”) the integration of learners at a disadvantage and (“B”) the integration of learners with special needs. The target groups of the program are: teachers (nursery, lower primary, primary and secondary teachers, conductors, etc.), the managers of pedagogical, educational and training institutions, the maintainers of these (municipality representatives, the educational employees of municipalities, notaries), educational experts, the employees of childcare services, civil organisations, municipalities of ethnic minorities, the representatives of the media, learners (children and young people in the schooling age), parents. The program consists of five development projects:

1. Supporting the development and initiation of teacher training programs in the institutions of higher education;
2. The development and realization of training programs for practicing teachers and experts;

3. Working out and realising programs increasing social sensitivity and the support for integrated education for local decision-makers, the representatives of maintainers and experts who are not teachers;
4. The development of integrated education's know-how, the creation of a database for methodologies and the creation of servicing program packets;
5. Designing research programs, prevention methods and models to prevent early school leaving and to realise the risks of drop-out at an early stage;

137. The Ministry of Education initiated the "From the last school bench" program in 2003 with the main purpose to review the skills of the approximately 5000 second and third grade students who are given forth as having mild mental disabilities and to support the integration of children with no disabilities. Besides this initiative the government offers temporary per capita support to help the integration of children into the mainstream classrooms and further support to insure that they meet the curricular requirements. Furthermore, among its goals, the program aims at improving the conditions under which expert committees function.

138. Considering learners at a disadvantage, there is a great significance of the *Vocational School Program* initiated by the Ministry of Education in 2002 for the modernization of the vocational school network, which educates a great number of learners at risk. The aims of the program are the following:

- Learners have to acquire the competences and knowledge essential for their success in life and for receiving a marketable qualification by decreasing the number of failure and by enforcing the fulfilment of the legal obligations for the time spent in education;
- The economy's need for workforce has to be satisfied by providing marketable knowledge for skilled workers, thus decreasing unemployment and its demoralising effects to the age group involved;
- In order to reach these targets, between 2002 and 2006 the following development will take place in the course of the program:
- In grades 9-10 the modernisation of the contents of general, occupational and craft group education, raising the quality of these programs, familiarising with, designing and applying up-to-date pedagogical programs;
- Strengthening cooperation with the economy, raising the labour market value of skilled workers starting their careers, providing a more practical training, reformulating the contents of the training;
- Modular program development for craft groups;
- Increasing the pedagogical, didactic and teaching organisational skills of teachers and trainers of vocational schools and of people joining practical training;
- Developing teaching materials, programs and methods providing special, closing up training for students at a disadvantage or for handicapped students;
- Preparing the management and maintainers of vocational schools for the duties accompanied by changing the school development, management and methodology;
- Providing the objective tools supporting the development of institutions.

CHAPTER 6. CONCLUSIONS AND ASSESSMENT

139. The historically fast economical and social changes following the political changes in Hungary, and also the not less intensive alterations carried out in the educational system have in many sense created a new situation of inequities in Hungary. As a result of this certain inequalities that existed earlier as well (e.g. the marginalisation of the Roma) strengthened and other inequalities were produced, to which education policy did not have to react earlier. However, the educational level of the population improved due to the expansion of secondary education providing the maturata and that of tertiary education, this was not followed by the relative improvement of the educational position of certain disadvantaged social groups, moreover, considering certain dimensions, the inequalities in education raised. The main reason for this is the extremely high rate of selectivity within the Hungarian education system. As a result of the dramatic changes of the economic and employment structure, the disadvantaged groups with a low educational level lost their positions in the labour market, which resulted in the low level of employment when compared to other countries of Europe. It has become clear by now that the level of employment can not be increased without reintegrating certain disadvantaged social classes with the help of education.

140. As a result of all these, by the millennium the question of equity in education has become from a question of the orientation of values more of a question deciding the competitiveness of the country. However, this recognition did not lead to changing the traditional approaches of equal opportunities to the maintenance of equity in education.

141. In the field of education, resulting from the accumulation of inequalities produced in the starting phase of education, which can be justified by measurable learner performances, children from different social backgrounds characteristically continue their studies in different types of schools in secondary education. A lower number of children studying in vocational -and many of them studying – in vocational high schools get into tertiary education and as a result of this – due to the very strong correlation between the educational level and participation in adult education – they lose the chance for utilising the possibilities of lifelong learning.

142. The two significantly important factors of inequalities within the Hungarian education system are socio-economic status and ethnicity. The Hungarian education system does not compensate for, on the contrary, it strengthens the inequalities produced by the different social backgrounds of learners.

143. Both the progression within the system (learning routes), both the measured learning performances show great differences according to the learner's socio-economic status. (These great differences also decrease the Hungarian educational system's average performance.) The differences of performances caused by the socio-economic background are slightly increased by the differences of location and they are highly increased by belonging to the Roma ethnic minority. In the cases of a high rate of Roma learners we have to count with drawbacks adding up from all three dimensions. (The inequalities of settlements and locations are not only highlighted in Hungary because they give a reason for different performances, but also because of the extremely decentralised and fragmented nature of the education system.) Among the problems connected to equity, the most serious is the high-scale and institutionalised negative discrimination of Roma learners. Considering other possible dimensions of inequities, individual skills and gender have been highlighted during the last few years. The problems connected to individual skills in this segment of education were highlighted as a result of the approaches focusing on integration and inclusion, as a result of which the rethinking of the role of the Hungarian special education system has

been initiated. The inequities connected to learner's gender became interesting due to the data informing about the increasing differences between the performances of boys and girls. The problems caused by international migration are not significant.

144. The mechanisms of the generational transmission of inequalities can be justified by the strong correlation between the aspiration for further education and between the social backgrounds. The basic motivator of this is the intention of parents to keep the acquired social position, and on the other hand the reflection on the necessary investments for getting into a higher position. Because of the lengthening individual educational careers, the lack of necessary information (e.g. career orientation consultancy) and because of the obstacles of access to learning opportunities, these efforts are disproportionately overwhelming and despite the high rate of individual reimbursement of learning, only a small number of people succeed in improving their inherited social positions.

145. Apart from the motivational barriers well-known in other parts of the world, the effects of institutional selection (and segregation) is significantly high in keeping up the inequalities of education, which is typical in many schools even today and which is produced by the selection pressure (to produce homogenous classes) produced by the non-differentiated teaching practices.

146. Even if to a different extent by each government, the problems of inequalities have been in the focus of educational policy during the last 15 years. Despite of this (however, the summarising assessment of policies is lacking) it can be said that these policies did not reach spectacular or at least measurable improvement in this field. One of the main reasons for this is the lacking conditions of system level policy making and implementation. Here belong the insufficient coordination of policies, the lack of an appropriate information system, the lack of summative assessment of learner performance (that would provide accountability), the lacking form of the evaluation of the institutional system and the inappropriate nature of the set of instruments of spreading successful educational practices.

147. The educational administration that has been in office since 2002 carried out several changes in the fields of regulation and financing with the aim of the strengthening equity in education. Here we can mention the decisive anti-discriminative regulations, the supplementary subsidising of integration programs and the modification of content regulation carried out with regards to the requirements of equity, and also the reform of the maturata (which was decided in 1996). Resulting from expansion the problems of inequity are strengthening in tertiary education as well, the government took preferential steps.

148. During the last 7-8 years several target programs initiated to decrease inequity in education started utilising significant budget subsidies. Here belongs the Arany János Program, the Phare program, The National Educational Integration Network and the Vocational School Program. Recently, the financial resources that can be spent on the strengthening of equity in education have increased as the EU's Structural Funds became available, however, due to the "resource taking" effect of these programs (setting aside own financial resources) the financial resources for previously operated programs decreased.

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