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The evolution of education policy in the European Union

Education is like war.

Some students (and perhaps teachers too) might agree when thinking of their relationships at school. However, the basis of the comparison here is a quotation by MONTECUCCOLI, who said: „Three things are needed for war: money, money and money.”

Well, this statement may apply to education as well, and Hungarian politicians not rarely refer to the scarcity of financial resources when talking about the feasibility of the reform of the education sector.

Our preparation for the integration into the European Union adds a new dimension to the challenges in this respect as well. It is therefore very important to get to know European education policy. In the following the evolution of the issue is introduced, with an emphasis on joint education programmes as an important part.

„If I had to do it all over again, I would begin with education.” (JEAN MONNET)¹

It has always been a subject for debate whether to approach the question of European integration purely from an economic aspect, or rather by focusing on the socio-political relations between individuals and organisations. At the time of the signing of the Treaty of Rome in 1957, the member states of the newly founded European Economic Communities

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¹ Rókusfalvy (1997), p. 36.

opted for the more materialistic viewpoint (this fact being reflected in the name of the grouping). Not surprisingly education was stipulated in the Treaty only in areas directly related to economic production and to the free movement of workers. Accordingly, at the time the community competence in education was restricted to training, general education remaining a function of the national governments.

As the integration of the European Union proceeded, the role of education and training has undergone changes – as have all the other areas of community policy-making. The framework of policy regulations, the *acquis communautaire* (~community achievements) is an ever expanding system of priorities and action plans, which – by getting more and more complex – imposes a greater adaptation burden on the newly joining member states. Although the community regulations are neither too extensive, nor too strict in the field of education, meaning a weaker force of adaptation to them, it is not negligible for the candidate countries to consider and follow them.

Let us first consider how the importance of and attitude to a common education policy in the EU has changed through its history.

The 1957 *Treaty of Rome* establishing the European Economic Community (EEC), did not include any regulations of general education, and did only touch upon the question of training. Where the Treaty had any competence regarding training was in connection with other policy areas (e.g.: common agricultural or social policy) or aimed at the general improvement of individual mobility and employment opportunities.

The general attitude of the member states to a common educational policy at the time (and for long in the future) was that they intended to keep their national authority, and therefore did not support a joint education policy for the Community.

In 1963 the Council of Ministers issued a decree describing the responsibility and authority of the member nations as follows:²

Accordingly the individual states had to

- ensure appropriate training opportunities for all working citizens;
- ensure opportunity for restarting and continuing education and for retraining during the entire period of working activity;
- create a situation where individual development can be reconciled with economic and technical conditions;
- ensure a smooth transition from basic to advanced training;
- provide information and professional guidance for workers and the youth;
- organise proper training of teachers and instructors; and

² Field, p. 2.

- provide the Committee with forecast about the future labour force requirements of their individual economic sectors.

Briefly speaking, the stipulation of education remained the function of the individual member states.

However, in contrast with the relative unconcern of the first 15 years, from the 1970's the Community began to turn its attention towards education and training. Among the manifold reasons were that education was considered as a means of forming the desired European citizen of the future. The dramatic development of the Far Eastern economies made the continent realise that there were forces capable of influencing market processes outside the Euro-Atlantic region as well. Another important factor was that the 1973 oil price shock and the ever worrying environmental problems of the decade reflected the vulnerability of the current, expansion-orientated economic system, the solution to which problem was seen in a shift to a human resource and information based model. This spurred arguments about how education and training could contribute to socio-economic development. New issues such as long-term investment in education, free-time training and the concept of life-long learning („education permanent”)³ came into the limelight.

The following paragraphs will explain that in spite of the relatively increased attention towards the question of handling education on a European level, the period of the 1970's was still full of contradictions and collision of interests.

Already in 1971 an official meeting was held for the education ministers of the member states. As a practical result of the event a working committee was set up, which issued a report in 1973 titled „Towards the European education policy”.

It was at this time that the Commission called upon HENRI JANNE, ex education minister for Belgium, to work out the principles of a community education policy. The JANNE report claimed that member states should harmonise their national systems on a gradual basis, ultimately resulting in a joint policy, but altogether no great importance was attached to the paper. With the joining of three new countries, the United Kingdom, Ireland and Denmark in 1973, the chance of elaborating a common policy to address educational matters diminished even further. The institutionalisation of the community education policy started as early as in 1975 with the establishment of the European Centre for the Development of Vocational Training (CEDEFOP). Its task was defined as to compare and contrast the training systems of the member states in order to lay the foundations of a joint policy and to foster the transferability of professional qualifications. In 1976 an action plan was

³ Field, p. 4.

worked out for the coming years, as part of which the following year a Commission directive was issued stipulating the education of the children of migrant workers. This regulation was the first to deal with general education, and it interfered in the member states' national affairs in a sphere that was undoubtedly justified, and also served as an example of matters requiring a community approach.

The next decade began with the European countries realising that a thorough and mutual understanding of each other's educational systems is indispensable for shaping a common policy. To enable a continuous exchange of reliable and up-to-date information, in 1980 a network called EURYDICE was set up, with a representative office in all member states' ministry of education. These offices supply the headquarters in Brussels with first hand information about the country's education system and policies, which data are further used in comparative studies, reference materials and analyses, to support the birth of a common European policy.

The 1980's witnessed the start of inter-governmental dialogues as well as the shaping of definite priorities on a European level. New action plans were set up, the financing of which was now realised from the common budgetary resources. At their annual meeting in 1985 the European ministers of education adopted a list of the most important areas of concern⁴. In this high priority was given to the comparative analysis of national training and education systems, to the closing of the gap between the national schemes, to co-operation in higher education, and to the mutual recognition of diplomas and periods of study. Community aims included fostering exchange programmes between youth organisations, and co-operation between schools and companies. Further emphasis was laid upon the impact of modern information technologies on education, the teaching of foreign languages, and helping the transition from education to adult life. The role of European co-operation was also seen in tackling illiteracy, supporting the education of the children of migrant workers, and ensuring equal opportunities for males and females and special education for the handicapped.

The mid-1980s laid down the directions of community policy for a longer time. The basic principle was to initiate projects that, acting as catalysts in the national education systems, would generate innovations serving community objectives. During the second half of the 1980's a number of significant education and training programmes were launched.

The role of legal jurisdiction must not be underestimated either in the development of European programmes in education. Widely-known lawsuits, where foreigners won a case against an educational institution or the local authorities for negative discrimination, paved the way to the

⁴ Halász (1996), p. 565.

launching of higher education programmes. Such cases were the Italian Casagrande's (1974), whose son did not get the same school grant as the German guest workers' children did, or the GRAVIER case (1983), in which the French university student was charged a higher fee at a Belgian school than his native fellows.⁵

We can say that the achievements of the 1980's were compromising in nature in a sense that they rejected inactivity as well as a direct stipulation of education within the Community.

Although the Single European Act in 1986 did not bring any change, the Maastricht Treaty (1991) establishing the European Union contained two articles stipulating education and training (Articles 126 and 127 respectively). However, these regulations were still cautious about interfering with the national systems of the member states. It was clearly stated that community policy was intended to supplement and add value to the stipulations of its members, and therefore did not mean to harmonise the individual policies.

The main objectives of Article 126 were to increase teacher and student mobility, to enhance European dimension in education, to foster co-operation between institutions and companies, to gather and circulate information about the education systems of the member states, and to promote distance education. Article 127 aimed at facilitating adaptation to industrial changes through vocational training, and improving initial and continuing training in order to facilitate vocational integration and reintegration into the labour market. Besides, mobility, co-operation with firms and the exchange of information were common goals with general education.

As emphasised earlier, the stipulations of the education sector in the community take the form of soft regulations, such as statements and decisions, which are not binding. However, there have been several papers produced to set directions for the community approach to education. One of the most important of these reports, a White Paper titled „Teaching and learning: towards a learning society” was published by the Commission in November 1995. This document forms the basis of the common European priorities and action plans up till the present day.

Why is it considered important to control education on a community level?

First, the nature of work and the way of managing production had changed, and in the new, autonomous activities a greater role was assigned to the human factor. Second, as a consequence of the globalisation process, no borders existed any more to stop the flow of workforce. Finally, with the speeding up of technological development, it

⁵ Halász, pp. 10-11.

became essential to follow the pace of scientific innovations, and to put the new findings to practice.

As a response to the changed conditions, new priorities in education and training began to take shape. The main lines were creativity, mobility, adaptability, understanding, judgement and decision. The right to education during the entire period of one's life was emphasised, as well as the importance of building employee skills.

Accordingly, a set of five objectives was worked out.⁶

First, the acquirement of new knowledge and experience is to be supported. It is indispensable to provide a system in which all one's skills are recognised in an accurate and transferable way, that is diplomas and other certificates show the exact qualifications of the individual, and are equally accredited in all the member countries. For this purpose a personal card containing information about the individual's professional skills and work experience is under development (so that not only years of study are accredited). The mutual recognition of diplomas and periods of study is important both in the school context, that is during one's studies (academic recognition), and in the labour market sense, meaning how qualifications acquired in one country can be used when taking up a job in another state (professional recognition). Mobility is another cordial point, which is supported – among others – by a newly proposed, pioneer project named European Credit Transfer System (ECTS). Under the auspices of the ECTS inter-institutional agreements can be concluded between the universities and colleges of the member states about the accreditation of studies carried out in each other's courses. It is also accepted that education appliances should always reflect the state of technological development, and should make use of fresh innovations. This is to be manifested in, for instance, the use of multimedia softwares.

Second, a closer and practical co-operation should be fostered between schools and enterprises. Educational institutions should for this purpose open up to the world of work and employment, letting the students experience real life before they actually have to take up a job. On the other hand, companies and enterprises ought to get involved in the training of new workforce. With their participation the curriculum could be made more lifelike and useful, „producing” workers with skills tailored to the actual requirements of the respective economic sectors. This principle should apply not only to technical schools but to higher education as well (as it is a practice at a number of universities abroad, e.g. London Business School, Università Bocconi, Mannheim University⁷). A means of

⁶ On the basis of „Tanítani és tanulni: a kognitív társadalom felé”, Munkaügyi Minisztérium 1996, and „Teaching and learning: towards a learning society”, European Commission, Luxembourg, 1995.

⁷ Benedek (1997), p. 18.

implementing this policy is work placement in industry, which is to be promoted.

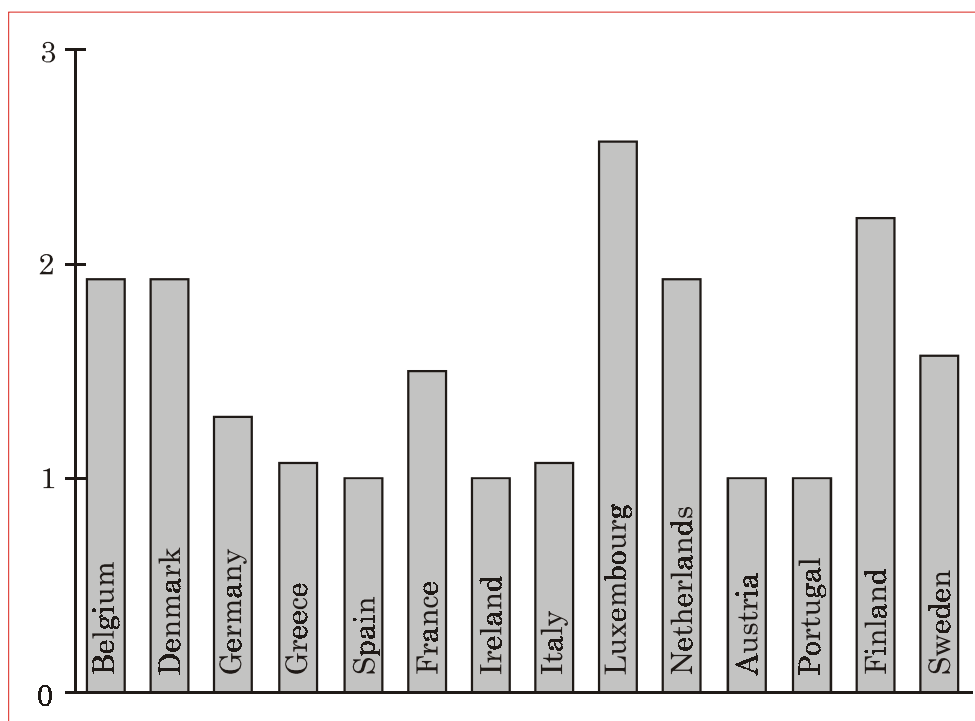


Figure 1
Average number of foreign languages per general secondary pupil, 1992/93
(EU average: 1.2)

Third, social exclusion should be prevented, and marginalisation process halted. Special attention is to be directed towards the long-term unemployed, the wage-earner elderly, those without a diploma, and towards women returning to work. In this context the concept of second chance schooling is to be introduced to enable the threatened societies to gain a firm financial and professional position.

Fourth, a good command of at least two foreign languages is a desirable standard for the European citizens, the learning of which languages ought to be started as early as in crèches. Experts envisage better results in other, general fields of studies for those with foreign language skills. It is beyond doubt that those able to make themselves understood in a second, third etc. language have a better chance to adapt to the new international circumstances, and can make a better use of the opportunities arisen from the common market.⁸

⁸ Chart data from „Teaching and learning: towards a learning society”, European Commission, Luxembourg, 1995, p. 95.

Fifth, an equal treatment of investments affecting human resources and training should be enforced. It means that these actions are to be taken as investments and not as current expenses, and also that a fiscal and monetary harmonisation of the national systems for settling education-related investments ought to be realised. Additionally, tax allowance should apply for these investments.⁹ It is also desirable that individual trainees be willing to invest in their own training (co-financing).

The Council of Education Ministers in 1998 May passed a resolution about the need to strengthen *European dimension* through education. There is not one single definition of European dimension, but the following matters are implicit. A sense of European identity should be firmed in the young, with a special emphasis on values such as democracy, social justice and human rights. The young generation is also to be prepared to take an active part in the social and economic development of the community. Quite understandably, it is also vitally needed to have satisfactory knowledge about the cultural, historical, social and economic background of the community as well as the individual members, and about the community's relations to third parties (countries, organisations).

Relatedly, the creation of the European citizen is another aim of the common education policy. A strong impetus was given to it when opponents of the EU appeared to threaten the integration. The evoking of a sense of common citizenship is realised through building social solidarity and solicitude, and ensuring a chance for free self-realisation.

As mentioned in the section about the historical background, an important factor in shaping a common educational policy has been the question of ensuring *innovation and competitiveness* through the strengthening of human resources. It has been recognised that the economic competitiveness of the community depends to a great extent on the training, flexibility and creativity of its workforce, which factors can be positively influenced by education and training. This is why the relations between training and the economy, and educational and employment policy are so greatly appreciated. The Union has used the 1998-99 screening of the candidate countries (see later) also to assess to what extent their education systems can contribute to the reinforcing of the competitiveness and innovation potential of the community (and of the applicant countries themselves).

Already in the 1993 White Paper „Growth, competitiveness and employment” it was recognised that unemployment cannot be tackled solely by economic growth, certain mechanisms helping with the adaptation to social and labour market trends are also required. These mechanisms can be called forth through education, especially that of the

⁹ Halász (1997), p. 32.

adult generation. This is why an increasing emphasis is put on adult education, lifelong learning, and the open and distance forms of education.

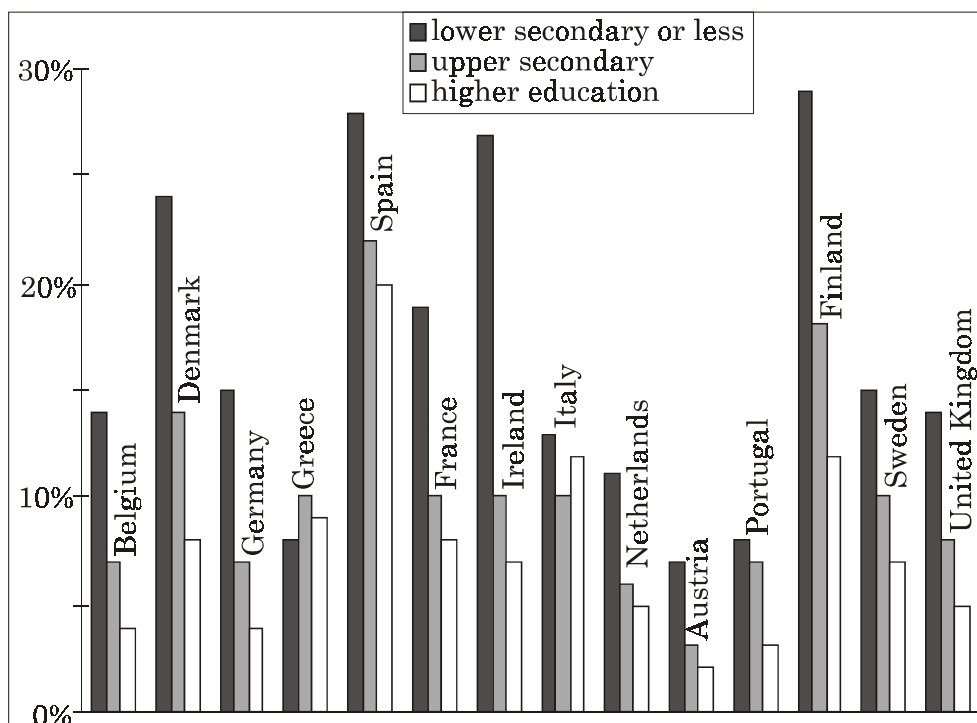


Figure 2
Unemployment rates (%) for people aged 25 to 35 by level of education, 1993

The extension of education is an important factor in tackling unemployment¹⁰

The last priority to be mentioned here is the need to follow technological development, and furthermore to support through education the transition to an information society. Accordingly, modern informatics and telecommunications ought to play a crucial role in education.

The influence of the Union in the national education systems can take four forms:

- through the European competence in training policy, which can further influence general and higher education;
- community actions and programmes;
- via the direct support of national reforms, from structural funds sources, and

¹⁰ „Teaching and learning: towards a learning society”, European Commission, Luxembourg, 1995, p. 97.

- through formal and informal communication when co-operating with other European bodies.

Table 1
The main education programmes launched in the 1980's – early 1990's,
with their respective budgets¹¹

Acronym	Program objective	Duration	Financing until 1992 (M ECU)
COMETT	co-operation between universities and economic establishments	1986-94	206.6
ERASMUS	exchange of university students	1987-	307.5
PETRA	training of youth and preparation for adult life	1988-94	79.7
YOUTH FOR EUROPE	European mobility of youth	1988-94	32.2
IRIS	training of women and girls	1988-93	0.8
EURO-TECNET	technological innovations in training	1990-94	7.0
LINGUA	foreign languages teaching	1990-94	68.8
TEMPUS	university exchanges outside the EC	1990-94	194
FORCE	adult training	1991-94	31.3

Of these four, *community programmes* have been given extra attention and impetus since the second half of the 1980's. These programmes are EU-coordinated co-operations between countries of the Union (and applicant countries) in which the voluntarily joining institutions engage in Union-related activities. The project activities are tailored to community priorities, and are jointly financed by the institution itself and the Union (the share of the school must usually reach 50%)¹².

¹¹ Halász (1996) p. 566.

¹² Sources: Szemlér (1999), pp. 6-7, and <http://europa.eu.int>.

An item in the EU budget is structural policies (taking up about one third of all the EU expenditure – see table 2), which is made up of Structural Funds and Cohesion Fund. There are three areas financed under Structural Funds:

- subsidies for underdeveloped regions,
- support for the socio-economic reform of regions facing structural problems, and
- *education, training and employment policy.*

According to Agenda 2000 the latter will have a share of 24.05 Bo EUR, that is 12.3% of the Structural Funds budget during the period 2000-2006.

Table 2
Share of structural policies in total expenditure, between 2000–2006

	2000	2001	2002	2003	2004	2005	2006
Structural policies [M EUR]	32,045	31,455	30,865	30,285	29,595	29,595	29,170
Structural Funds [M EUR]	29,430	28,840	28,250	27,670	27,080	27,080	26,660
Cohesion Fund [M EUR]	2,615	2,615	2,615	2,615	2,515	2,515	2,510
Total expenditure [M EUR]	91,995	93,385	93,805	93,005	91,465	90,795	90,260
Share of structural policies in total expenditure ¹³	34.8%	33.7%	32.9%	32.6%	32.4%	32.6%	32.3%

The joint European education programmes involve different groups of participants and serve one or more of the community objectives (for example under COMENIUS priority is given to projects that enhance citizenship by dealing with subjects like European cultural heritage or human rights issues).

In line with the programme objectives, educational establishments can initiate projects with partners from other European countries, and they can compete for financial support to cover their activity expenses. As mentioned earlier, the support of these projects is supplementary in nature, meaning that the tendering institution must always contribute to

¹³ Own calculations, rounded to decimals.

the financing. (However, the school share does not need to be actual money, it can be, for instance staff time etc.)¹⁴

The EU share can be of two types of source.¹⁵ If the country of the participating school is a member of the Union, the community contribution comes from the annual general deposit paid by the country to the EU. In case of non-member countries, the governments in question must pay in a certain amount to the Union for education financing purposes (a so-called „entry ticket”), and the educational institutions of the country can tender to get a share of this sum back to cover their project costs. (This entry ticket for Hungary in 1998 amounted to ECU 4,902,000; 50% of which was paid in by the government, the rest being covered by PHARE aid.)¹⁶

The question of who decides on how much money to assign to which project depends on whether it is a centralised or decentralised action. In case of centralised actions the tenders have to be handed it directly to the Directorate General (DG) XXII of the Union, which is in charge of education. The selection and monitoring of the awarded projects are pursued by DG XXII itself. Here the role of the national agencies is restricted to the provision of information. On the other hand, project bids for decentralised actions are handed in to and awarded by the national agencies. The schools conclude the project contract with the national agency instead of the Directorate General.

Community activity in the sphere of education and youth led to a major revision of existing programmes in 1994-95.¹⁷

With a budget of ECU 850 million for the period 1995-99 a new super-programme named SOCRATES was set up. It assimilates the following fields of education: the already existing ERASMUS, LINGUA, EURYDICE, NARIC (network of national academic recognition information centres) and ARION (study visits for educational decision makers), adding to them a new schools partnership programme, COMENIUS, and actions in support of distance learning and adult education.

In the field of vocational training, the LEONARDO programme with a 620 M EUR budget until 1999, brought together the previously mentioned COMETT, FORCE, PETRA, EUROTECNET and IRIS action programmes.

To these two was added an exchange programme (outside the educational sector) called *Youth for Europe*, with a budget of 126 M EUR.

¹⁴ The Hungarian Ministry of Education has held out the prospect of financial support for schools participating in European education programmes. (Its Norwegian counterpart grants a 50% support to schools to cover project expenses.)

¹⁵ Szép, p. 11.

¹⁶ Socrates Hírlevél, Socrates Nemzeti Iroda, 1999, p. 2.

¹⁷ Halász, p. 32.

Table 3
Two most popular programmes in the primary and secondary sector¹⁸

COMENIUS		LINGUA	
Action 1	School partnerships	Action A	European co-operation programmes for language teacher training
Action 2	Education of the children of migrant workers, occupational travellers and Gypsies	Action B	In-service training in the field of foreign language teaching
Action 3.1	European In-service Training projects	Action C	Assistantships for future language teachers
Action 3.2	Grants for individual participants in European in-service training courses and activities	Action D	Development of instruments for language learning and teaching, and the assessment of language competence
		Action E	Joint educational projects for language learning

One common characteristic of all these community programmes that must be mentioned is that they let their target groups interpret and apply the macro-level policies of the EU so that it suits their conditions and requirements. This way two important goals are attained; participants schools remain interested in what they do, and they work efficiently.

After 2000 these programmes will not end but will go on with a new budget and innovations arising from past experience. Experts have, for example, worked on the new SOCRATES II. programme, to make it even more efficient and successful. They have decided that the new phase, to which 1.4 Bo EUR have been allocated for 7 years until 2006, will be less centralised, with the national agencies playing a greater role, and in order to lessen administration, several-year contracts will be introduced in some actions instead of the applicants having to renew their contract every year. A greater emphasis will be laid upon adult education (GRUNDTVIG) and open and distance learning (MINERVA).¹⁹

¹⁸ Socrates - Guidelines for applicants 1998, European Commission, pp.51, 69.

¹⁹ Átalakulás és folytonosság: a Socrates program II. szakasza, National Socrates Agency, Budapest, 1999.

Central and Eastern European countries, including Hungary, have had the right to take an active part in European education programmes since 1997 (there had been opportunities earlier as well, though with far not the same conditions). Hungary's participation in such projects and the process of integration are in an interaction; both help the other.

Although a more thorough picture of the Hungarian experience would exceed the limits of the present publication, it can be concluded that Hungarian schools have taken a successful part in joint European programmes, and steps have also been taken aiming at the mutual recognition of diplomas, increasing student mobility and other EU objectives. However, as the EU also pointed out in the 1998 screening of the Hungarian education sector, there are still weak points where improvements must be made, most importantly in the sphere of foreign language teaching, teachers' salary and technological facilities of schools.

The education sector must be appreciated as capable of playing a major role in Hungary's accession to the EU, by preparing our fellow citizens for the conditions of life in the Union in both private and professional terms, by widening our horizons and knowledge about other cultures, and by supplying our economy with highly skilled experts who will be able to help Hungary gain a competitive position in her new environment.

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