

EI Research Institute (EIRI) Report
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SCHOOLS AT THE MARGINS

**Assessing the impact of the global economic crisis in Central and Eastern
Europe: four case studies from Poland, Romania, Slovakia and Serbia in
2010**

DRAFT

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Foreword

There can be little doubt about the relevance of this study in this time. The global economic crisis, which started unexpectedly in 2008, struck societies with its consequences on public budgets and education funding, in particular. Effects have been more direct and profound in Central and Eastern Europe, whereas it has taken some time for the Western side of the continent to perceive them. But, while the crisis came as a shock to many educators in Western countries, the shock has been less harsh for Eastern education systems, which had already been under a constant change for the last decades.

This study tries to explore the conditions of relatively small schools, and, in particular, of socio-economically disadvantaged groups, at the periphery of societies in four selected countries: Poland, Romania, Serbia and Slovakia. It aims at seeking first-hand impressions of local teachers in order to put them in the broader perspective of education policy trends in the region.

The research has been implemented by four scholars, one from each surveyed country, engaged on the basis of their knowledge of national policies. They have drawn on the unique evidence collected through individual interviews and questionnaires in schools, local communities and municipal governments. The field work has been carried out throughout September and October 2010, at a time when surveyed countries were in the middle of policy developments on their education systems. As such, the study remains a snapshot of a given time and space; nevertheless, it is illustrative of the broader trends in education reforms.

The individual case studies have been brought together, analyzed and presented in a consistent report by Laura Figazzolo, research consultant at the Education International Research Institute, with the intent of providing a broader policy perspective in the light of the substantial work undertaken by Education International on the impact of the global economic crisis on education in the last years.

We would like to acknowledge the support provided by the Open Society Institute Education Support Programme in London, UK, through a financial grant to the EI Research Institute, which made this study possible. In particular, we would like to thank Aleesha Taylor, Director of Special Projects at OSI's Education Support Programme, for her efforts and advise.

We hope that this study will find many readers among academics, unionists and civil society actors, and will serve as a basis for further discussions about the future of education systems in Central and Eastern Europe and at the global level.

Respectfully,

Ron Henderson,
Chair of the Board, EI Research Institute

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Eugen Palade, education consultant, who has written the case study on Romania. He has worked many years in the evaluation of Educational Programs and Projects for the Romanian Government, the Ministry for Foreign Affairs of Finland, the Kosova Education Centre, Charles Kendell Ltd. (UK), the National Agency for Community Programmes in the Field of Education and Professional Development (Romania), the Soros Foundation (Romania);

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A. Background

The international economic crisis has had a heavy impact on social services in both the developed and the developing world¹. Education, in particular, has been highly affected, as it is the largest public sector (together with health). It is mainly countries in Europe and North America, as well as some countries in Asia, including Mongolia, Japan, and Taiwan, which have been affected by the crisis so far, while the impact in other parts of the world is still foreseen for the future. Those countries that suffered the most are those which experienced rapid economic development in the last decade and, as a result, were most vulnerable to the collapse of the international financial system. By comparison, larger and more prosperous countries, which also have been affected economically by the crisis, were in a better position to benefit from large-scale stimulus packages that also target education, while weaker and more vulnerable countries depend increasingly on loans from international organisations, such as the International Monetary Fund (IMF) and/or the European Union (EU). In some countries, conditionality tied to IMF loans has resulted in reduced government expenditure in education, in particular on teachers' salaries.

In Central and Eastern Europe (CEE), the impact of the crisis has proven especially hard for two reasons mainly. On the one side, social services have for decades been provided by the state, and the sudden loss of this provision has troubled the entire system of public services. On the other side, all countries in the region have experienced a rapid growth in the last decade, and the consequences of the sharp decline in this growth are highly affecting citizens, especially in absence of well consolidated social and savings' systems.

It is possible to highlight a couple of common issues among countries surveyed by EI in CEE².

Cuts to the state budget for education in 2009

In 2009, cuts across the education sector have been widespread across the region. Budget revisions in Serbia in April 2009 led to a decrease in expected new investments by 25%, while anticipated salary increases linked to inflation were not realised. In Lithuania, the state budget for education decreased by 8%, with a consequent reduction of teachers' basic monthly salaries by 4.7%. Unions' participation in negotiations with the government led to the lowering of intended public sector wage cuts from 10 to 8%. In Slovakia, the state

¹ For the data contained in this background please see EI, 2009, *The Global Economic Crisis and its Impact on Education*, www.ei-ie.org/handsup

² EI HIGH LEVEL SEMINAR on *THE IMPACT OF THE ECONOMIC CRISIS ON EDUCATION IN CENTRAL AND EASTERN EUROPE*, Warsaw, 2 - 4 September 2009 – EI, 2009a

budget has been revised, and expenditures have been cut in all sectors, including education. By comparison, in Romania, the overall budget allocation for education has already been reduced by 10%, and the government has failed to give effect to a law governing a rise in teachers' salaries that had been previously approved. In higher education, national scientific research competitions, whereby universities are able to compete for additional funding, have been suspended for 2009, while budgets for research projects in progress have been severely reduced (by 70%). In Estonia, teacher minimum salary, initially increased by 8% at the beginning of 2009, have since been lowered to the salary levels received in 2008. Non-salary compensations (health care/insurance and subsidised child care) have been reduced, too. Administrative staff and support personnel have been laid off and a freeze on recruitment has been applied. Further cuts to education have taken place in the area of expenses for maintenance and renovations of education institutions. In Bosnia & Herzegovina, education sector employees have seen their salaries cut by 10%. In Hungary, too, spending on education has been reduced by 10% and salaries have also been cut by 10%. Latvian teachers faced a salary cut of at least 20%, which is significantly higher than cuts faced by other public sector employees. As of September 2009, the central government's overall budget for teachers' salaries in primary and secondary education has been reduced by 50,9%. Basic pay has been reduced by 6% across the public sector in Croatia, and the total education budget has experienced a 9% cut. The education sector in Macedonia has also seen budget reductions.

Loan negotiation and union involvement in response to the crisis in 2009

The crisis triggered events that have shown not only the economic vulnerability of many countries but also their weakness or, even, their lack of embedded social dialogue processes, which could have moderated the crisis' social impact. "The fall of GDP in 2008 - 2009 and the ensuing urgent budgetary crisis have pushed many governments to seek emergency help from international community. The governments of Bosnia & Herzegovina, Latvia, Hungary, Poland, Republic of Serbia and Romania have negotiated loans from the International Monetary Fund and their conditions affecting education without consultation or involvement of unions in the course of negotiations" (EI, 2009). The IMF and the European Commission provided Latvia with a combined €7.5bn bailout in December 2008, and first loans were received from the European Commission in February 2009 (€1bn) and in July 2009 (€1.2bn). LIZDA, EI's affiliate in Latvia, reports being formally involved in discussions in the context of the crisis but little more. In Bosnia & Herzegovina, the IMF and the government have agreed on a €1.2bn loan, the conditions of which include cutting the state budgets in 2009 and 2010. EI affiliates in Hungary (Workers Councils' Teacher Branch, MUNKASTANACSOK) and in Poland report a poor relationship with the national, regional and local governments, and, in 2009, have not been consulted in the context of the crisis. Hungary was the first country in the EU to receive an IMF led bailout of €20bn to avoid bankruptcy in 2008. Poland requested a Flexible Credit

Line (FCL) from the IMF in early 2009, which was granted in April 2009 to the amount of €15.5bn. The government of Romania has negotiated and signed an overall €20bn loan from the IMF, the World Bank and the European Bank for Development; an additional one billion Euro was raised by other financial institutions (EurActiv, 2009). National union confederations have been partially informed of these negotiations. Estonia has negotiated a five-year loan with the European Investment Bank (EIB) for an amount of €550m, intended to co-finance investment projects with EU funds and for the financing of infrastructure projects. EEPU in Estonia reports having been involved in negotiations with the government concerning salaries and working conditions of teachers. The Independent Union of Research and Higher Education Workers in Croatia and the Christian Trade Union of Education Workers (CTUEW) in Lithuania (both countries are not negotiating or receiving a loan from the IMF, World Bank or the EU) have been involved in negotiations with the government as to the follow-up on the economic crisis, either in relation to investments in education as well as a stimulus package (Croatia) or concerning the retention of working places for teachers and on the remuneration structures for teachers (Lithuania).

Local perspective

What we know so far, however, mainly concerns the broader national context, while data on what is actually happening at the level of the municipalities is missing. In other words, there is a gap of information between the national and the local level. The research phase of this project aims at filling this gap with quick and sound information on the reality at local level. Preliminary evidence EI has collected in the region through questionnaires sent to affiliates, media reports and other sources indicates that the most dangerous consequences of the cutbacks in education funding concern the closure of many schools in small rural communities and disadvantaged areas. This also means layoffs of many teachers and other education staff and limited access to education for students. A key reason for school closures in small communities may be the little number of students enrolled in schools; arguably, the crisis has just enforced policies that could be otherwise driven by demographic trend. In fact, education funding is increasingly allocated from central sources to a specific school (or respective municipality) according to the number of students enrolled in this school. When student numbers drop, schools can subsequently be shut down, with heavy consequences on both teachers' employment and access to education at community level.

Impacts of crisis embodied in policies of cuts, of course, do not affect all social groups equally. Broadly speaking, **ethnic and linguistic minority groups** are likely to suffer disproportionately, as they tend to be located in deprived areas or enrolled in already marginalized education institutions, whose maintenance may not be the priority for policy makers.

Furthermore, evidence suggests that central governments are increasingly trying to delegate the function of education provision to **local authorities**, on the ground of the argument that municipal governments know better the needs of their population in terms of access to schools and should hence be responsible for organizing the school network in their territories. However, with declining income and budget allocations from central governments (for teacher salaries and other costs), local governments may be pushed into very difficult compromises either on access to education or on its quality, or both. In addition, when combined with effects of new funding strategies based on the principle 'money-follows-student', schools may find themselves in direct competition for students and public money in the same municipality or with schools in other localities. The following box illustrates the problem of small rural schools in Latvia as well as the approach adopted by Soros Foundation Latvia in 2009.

Box 1. Closing down schools in Latvia

In Latvia, due to the reforms implemented without the sufficient capacity and resources, such a situation – i.e. a small rural or urban school left alone with planning its own survival/development and fundraising – is, indeed, quite realistic. It is the case for primary and secondary as well as for vocational schools. This is especially true to what regards schools in Roma-inhabited districts (Jekabpils, Tukums, Sabile, Ventspils districts) and in those with multiethnic composition (Daugavpils, Kraslava, Rezekne, Jelgava districts). Schools at risk of closing down would need external support for the revival, i.e. a second chance – the main idea of the SFL Project as being implemented in Latvia.

More than three hundred proposals for participation into the SFL project have been received from schools in Latvia, which is almost a third of all schools in the country. This responsiveness to the proposal indicates the alarming scale of need schools face. In the first stage of the project, an appointed committee of experts scrutinized the proposals and selected about fifty schools. These schools were asked to create a project team consisting of pedagogical staff, school leadership, representatives of local communities and municipalities. Through the training and mentoring provided by the project, these teams work out their full project – an intervention plan to reform the school's functionalities in order to respond to the needs of their respective communities and to sustain the activities of the school as a learning centre. The school staff involved in the project will be supported by small stipends, and, consequently, the developed action plan will also receive financial support for implementation. The real and serious commitment and involvement of the local municipality/community is crucial to ensure the sustainability of the single projects.

Source: EI, 2009

Rationale

Assessing the impact of the global economic crisis on education in Central and Eastern Europe is the first step towards the definition of a strategy aiming at countering these (mostly negative) effects in the region. The identification of a number of actions meant to prevent schools to shut down and to allow teachers to survive the crisis may be a strategy out of the crisis in the education sector. This identification, however, can only be done on the basis of a sound evaluation of the actual impact of this financial crisis at local level, with the consequent analysis of local needs. That is why Open Society Institute (OSI) and Education International Research Institute (EIRI) decided to join their forces to develop a common assessment of the situation in the region.

Objectives

The main goal of the report is to present an **assessment of the impact of the economic crisis on the education sector at local level**. This concerns, particularly, small schools in economically and socially depressed regions, in rural areas, in small towns and urban peripheries with a strong presence of marginalized groups (often ethnic minorities) and economically disadvantaged groups which likely are most negatively affected.

Methodology

The report investigates the particular educational situation and the actual impact of the crisis, as well as communities' necessities, at local level, in four countries: Slovakia, Serbia, Romania, and Poland. The research has been undertaken by selected professionals in each country. They have visited school sites, interviewed school principals, teachers and local community stakeholders in order to assess the situation, priorities and feasibility of the interventions.

The background **research** is based on two instruments:

- Questionnaire submitted to school teachers;
- Interviews conducted in schools with individual teachers, school principals, local administrators/authorities.

The questionnaire has been developed by researchers according to the national context, and focuses on 20-25 topics and questions:

- Financial aspects, salary before and after crisis, cost-of-life, school funding,
- Working conditions, classroom sizes,
- Status of teachers (are there changes in employment status?),
- How many teachers and other staff have been fired? Who were they in terms of specialization, qualifications, age, gender, etc.?

- Have schools been closed, merged, restructured or similar trends are expected in the near future?
- Legislation (which laws have changed regarding education?),
- Gender aspects (are there specific problems for women teachers?),
- Issues concerning disadvantaged groups/minorities (how are Roma/other minorities' students affected? What about students with special needs, those in distant rural areas? For example, are there transportation provided?),
- The situation of older teachers and aspects related to aging of teachers (are teachers pushed to retirement in spite of their wish? How does that affect their material conditions and the quality of teaching in school?),
- Quality of education in terms of educational materials, teaching and preparation time,
- CPD and teacher training (are there cuts? Has access been limited? Who takes the relevant decisions?),
- State of infrastructures, repairs of buildings and classrooms,
- Work-related psychological issues (stress, uncertainty, burnout, pressure from peer-competition, etc.),
- Job satisfaction, compared to the past,
- Future professional plans (do teachers intend to leave? Are they looking for alternative jobs? Are they doing other jobs?),
- Particular aspects related to the national contexts.

The same questions, analysed more in depth, have been used for interviews both with teachers and school principals. For local authorities, only relevant issues have been investigated.

The sample is too narrow to be representative of the whole situation of single countries, however, it is intended to be exemplary of urban peripheries and rural areas where marginalized groups are particularly present, and focuses on small schools. It concerns at least two different areas in each country (for example: North, South), particularly if these areas present different levels of socio-economic development. Fifteen schools have been visited in each country, where questionnaires have been distributed and collected from about ten teachers in each school (proportionally divided between geographical areas), plus two/three interviews in each school.

In the questionnaires and during the interviews respondents were asked to compare situation "before" and "after" the crisis, without specifying the exact time and allowing national context and perception to play role. The data were collected during September - November 2010. Usually, the years 2007 and 2008 are referred to as "before crisis".

The results obtained from the research work (as detailed as possible), summarized in a technical analysis, have been submitted in English to the Project Coordinator by single researcher from each case country, who wrote this integrated final Report. This report is hence based on national technical analysis submitted by researchers: Natalia Bednarska (Poland), Eugen Palade (Romania), Martina Kubanova (Slovakia) and Borka Visnic (Serbia).

The results of this study will be published and disseminated among EI member organizations and made publically available for teachers, educators, academic community and policy makers through meetings and seminars at national and international level.

Results and limitations

First and foremost, the report provides an overview of the impact of the economic crisis on education in four Central and Eastern European countries (Slovakia, Serbia, Romania, Poland), with a focus on small schools in economically and socially depressed regions, in rural areas, in small towns and urban peripheries with a strong presence of marginalized groups (often ethnic minorities) and economically disadvantaged groups.

The economic crisis has definitely worsened the already critical situation of education in the region, with specific features in each surveyed country. Its impact, however, seems to be particularly relevant at local, rather than at national, level. If, in fact, at country level the crisis has accelerated processes of reform that were already ongoing, harshening in some cases their negative effects on the sector as a whole, consequences are always most directly faced at local level. Paradoxically, local communities and policy makers, or even teachers, may not necessarily understand the broader context and perspective. Hence, the report presents a set of critical recommendations for policy makers, relevant at national as well as at local level.

As such, the paper is only a snapshot of the situation in some areas of concerned countries. It is not to be intended as representative of the entire wide range of consequences the financial crisis has had on education in Central and Eastern Europe. In spite of this limitation, though, it provides a qualitative picture of the specific contexts that researchers have surveyed.

B. Case studies

1. Poland³

1.1. The National Context

The Polish education system comprises pre-school institutions (*kindergarten* or pre-school classes), primary school, lower secondary school (*gimnazjum*) and upper secondary school (post-*gimnazjum* schools). In the light of the existing law, institutions of higher education (tertiary education) do not belong to this system. Children must attend compulsory education for ten years from the age of 6. A child aged 3 to 5 may receive pre-school education, which is not compulsory, but all 6 year-old children attend either *kindergarten* or pre-school classes organized in primary schools, as the Ministry of Education introduced an obligatory 0 grade in the school year 2004/05. Children between 7 and 13 attend primary school for a period of six years. Primary schools are divided into two stages: the first stage (grades 1 to 3, 7-10 years of age) offers integrated early school education, and the second stage (grades 4 to 6, 10 -13 years of age) provides subject teaching. At the end of primary school, pupils have to take an external obligatory test (set by external examination commissions and assessed by examiners selected by these commissions) with an informative character. All primary school leavers continue their education in a 3-year lower secondary school (13 - 16 years of age). At the end of this level, pupils take a compulsory external examination organized by the regional examination commission. All pupils attend public school free of charge. The only admission criterion is the age limit (for pre-school class: 6 years of age during the calendar year in which compulsory education starts, for primary school: 7 years of age). Parents are obliged to register their children in the nearest school or *kindergarten*. Core curricula for compulsory teaching, created at central level by groups of experts appointed by the Ministry of Education, are the same for all pupils. For the first stage of primary school, the curricula for integrated teaching apply; the second stage of primary and lower secondary school, instead, has curricula for separate subjects and cross-curricular themes.

In 2008/09, there were 17,280 pre-school institutions (both kindergartens and pre-school classes attached to primary schools), attended by 919.1 thousand children. In 2008/09, there were 14,067 primary schools and 7,204 lower secondary schools, attended by 2,294.4 thousand and 1,381.4 thousand pupils respectively. In 2008/09, there were 2,386 general upper secondary schools with 686.4 thousand pupils, 3,146 technical and specialised upper secondary schools with 622.4 thousand pupils and 1,784 basic vocational schools with 239.1 thousand pupils. In the same school year, 3,369 postsecondary schools were attended by 344.1 thousand students. In the academic year 2008/09, there were 456 Higher

³ The background country case study has been prepared by Natalia Bednarska, independent researcher.

Education Institutions in Poland (both public and non-public) and 1,927.8 thousand higher education students. In December 2008, the number of children in age of compulsory school was 4,761,363, accounting for 12.5% of the total population. In 2008/09, almost all pupils attended public-sector schools (98%). In the school year 2008/09, there were 486 800 full-time teachers in Poland, i.e. 23,700 trainee teachers (4.9%), 96,100 contract teachers (19.7%), 168,100 appointed teachers (34.5%), 198,900 chartered teachers (40.9%).

Most of the funds for education come from the state budget. In line with the Education System Act of 1991, schools can be of two types: public (state) schools, which offer free education within the framework of the core curricula, and non-public schools, i.e. civic (social), church or private schools. All these non-public schools may have their own curricula. They are financed by fees received from parents. Funds can also come from private enterprises and foundations.

The national educational policy is developed and carried out centrally, while administration of education and the running of schools, pre-school institutions and other educational establishments are decentralized. The administration, organization and decisions linked to the use of financial resources by schools are the subject of consultation between the school and the authority which runs it, i.e. local authorities (*gminy*) in case of *kindergartens*, primary and lower secondary schools, and district authorities (*powiaty*) in case of upper secondary schools. Provinces (*województwo*) have coordinating functions, as they supervise the implementation of the policy of the Ministry and are being responsible for pedagogical supervision. The inspection of teaching standards in schools lies under the Ministry of Education and is carried out by a regional administrative body (*kuratorium*).

The language of instruction is most commonly Polish. However, according to article 13 of the School Education Act, a public school supports pupils in retaining their national, ethnic, linguistic and religious identity with a particular emphasis on their history and culture. Upon parents' request, teaching may hence be organized in separate groups, classes or groups, classes and schools with additional language, history and culture teaching, or even in interschool educational institutions. Foreign language speaking children have the right to be helped by a person who speaks their mother tongue, employed as a teachers' assistant by the school headmaster, for no longer than 12 months. Foreign students also have the right to additional compensation classes covering subjects taught in the school. Such classes are organized by the body running the school but no longer than for 12 months.

In the school year 2008/09, there were the following numbers of minority students:

- 33,833 pupils in 579 primary schools and interschool institutions – 69.5% of which were learning in German, 20.5% - Kashubian, 4.4% - Byelorussian, 2.9% - Ukrainian and 0.9% - Lithuanian. There are several schools for Slovak and Lemko minorities.

- 12,318 pupils in 217 lower secondary and interschool institutions – 77% of which were learning German, 8.8% Kashubian, 7.3% Byelorussian, and 4.2 % Ukrainian.
- 1,345 pupils in 19 general (upper) secondary – 57.1% of which were learning Byelorussian, 22.2% - Ukrainian, and 11% Kashubian.

In total, in the school year 2008/09, 47.5 thousand pupils were enrolled in schools for national and ethnic minorities and in schools organising additional classes in the languages of national and ethnic minorities.

The school year is divided into two semesters, comprising about 185 days between September and June. Schools (teachers) can choose the textbooks from a list approved by the Ministry of Education. They are however free to decide teaching and assessment methods and to introduce innovative teaching methods and choose curricula which are approved by the school head. They can also develop their own curricula – based on core subjects – and submit them to their school head for approval. A new curriculum reform has been introduced in the last years, with the main aims to:

- adjust the content of teaching to the present population of pupils,
- prolong time allowed for implementing the general knowledge cycle, i.e. give teachers and students of lower secondary and upper secondary schools enough time to cover all the necessary knowledge by creating a coherent curriculum for the 6/7-year period, instead of dividing it into two separate, repetitive three-year cycles,
- adjust the core curriculum to the perceptive ability of younger students as a result of lowering the school starting age

Teacher education and status

Teachers must have a higher education qualification. The type of training required depends on the stage of education:

- Primary education: the teacher is required to graduate from the first or second cycle studies (they last 3 or 5 years, teachers are awarded the titles of B.A. or M.A., or from teacher training colleges (they last 3 years and finish with a diploma);
- Lower secondary education: a degree of B.A or M.A is required;
- Upper secondary education: a Master degree is required (M.A. only)

The completion of professional training is also required at all levels of education. Teachers should undergo professional training; they should be competent to teach two subjects, they should be computer literate and have a good command of a foreign language. The amended Teachers' Charter, adopted on the 18th of February 2000, has introduced four categories of teachers: Trainee teacher, Contract teacher, Appointed teacher, Chartered teacher. Chartered teachers with an outstanding record may also be awarded the title of honorary school education professor. Trainee and contract teachers have the status of

contractual employees; appointed and chartered teachers enjoy the status of career civil servants.

Between the 18th of January and the end of April 2010, the Ministry of National Education organized a wide public consultation on changes in vocational and continuous education and in special needs' education - a special website for posting questions and remarks was opened and a series of regional conferences presenting the planned changes were organized. Key aims of the changes in vocational training are to make the training more current and practical in cooperation with employers, in order to match the labour market needs. Special needs in education are not only those of students with learning difficulties but also those of the particularly gifted students. The changes the Ministry has outlined entail special individualized provision at schools for students with special needs.

Home learning

Changes introduced to the law allow children to fulfil the duty of a year-long obligatory pre-school preparation and school itself outside schools or nurseries. Parents are given permission to teach their children at home after a psychological-pedagogical institution issues a positive opinion. The results of home learning are then checked by the headmaster during classification exams, once a year. A child taught at home follows the same curriculum as children learning at school.

Additional care of students

From 2009/2010, teachers employed in primary schools, lower secondary schools and upper secondary schools are obliged to teaching or taking care of students for an additional hour within their working time. From 2010/2011 teachers in primary schools and lower secondary schools are obliged to spend additional two hours with students within their working time. Additional hours can be devoted to: after-lessons care; additional foreign language education, ethnic or national minority language education, not included in the framework curriculum for a given educational phase; realization of specialization in specific subjects; organizing activities for a given group of students, taking into consideration their needs and interests, including didactic and compensational activities; teaching the history and geography of the country of origin of national minorities and cultural ancestry of ethnic groups - in schools with minorities or ethnic groups; activities which increase educational chances of the students: for work with talented students or students with learning difficulties; activities that expand students' interests.

1.2. Analysis of the collected data

This analysis is based on 112 questionnaires and interviews conducted to 15 teachers and 15 head teachers from 15 schools of three different areas: Podlasie (North East Poland), Śląsk (South Poland) and Mazowsze (Central Poland). Podlasie is one of the poorest Polish regions of the country, with a large percentage of non-Polish population and economically disadvantaged groups, a very agricultural region. 9 schools have been visited there: 5 in Hajnowski (Czeremcha, Czyże, Dubicze Cerkiewne, Nowokornino, Orla) and 4 in other districts (Andryjanki, Falki, Mień, Strabla). Śląsk (Silesia) is the most industrialized and urbanized region in Poland, with a strong presence of minorities and economically disadvantaged groups (as a result of unemployment caused by closing coal mines). 5 schools have been visited there, in 3 districts: the cities of Świętochłowice (1 school), Zabrze (2 schools) and Ruda Śląska (2 schools). Mazowsze is an agricultural region. One school has been visited in the district Sokołów Podlaski – Łazów. This rural area is characterized by a strong presence of economically disadvantaged groups. Interviews have been conducted with 9 local administrators in Czeremcha, Czyże, Dubicze Cerkiewne, Hajnowka (running body for school in Nowokornino), Orla, Brańsk (running body for school in Mien), Boćki (running body for school in Andryjanki), Sterdyń (running body for school in Łazów) and Świętochłowice.

1.2.1. Financial Issues

Teachers' salaries

For the great part, respondents observe a moderate rise in their gross and net salaries and a hardly noticeable rise in the amount of entitled social benefits. For several years, teachers have been the only group from all government employment sectors to see their salaries increased. Between 2005 and 2007, their salaries had been increased by 6%. In the subsequent years, they had been increased altogether by 30% (including a 7% increase in September 2010). In practice, increases range from 60 to 110 PLN net (13 Euros ca.). In September 2010, teachers have received 7% of salary increase. Further increases are planned for 2011, subjected to negotiations with trade unions. This pay rise is very limited and does not compensate for increasing costs of living in the country.

In particular, the majority of respondents observe a moderate rise in their gross (about 64% of respondents pointed that answer) and net (about 62% of respondents pointed that answer) salaries after the crisis – while about 23% of respondents do not observe any changes in their gross salary and about 21% respondents do not report any changes in their net salaries. Since the 1st of September 2010, the minimum monthly gross basic salary for teachers with MA degree and professional training is as follows:

- for trainee teachers: 2,039 ZLOTY (520 Euros ca),
- for contract teachers: 2,099 ZLOTY (535 Euros ca),
- for appointed teachers: 2,383 ZLOTY (606 Euros ca) and
- for chartered teachers: 2,799 ZLOTY (712 Euros ca)

Since the 1st of September 2010, the average monthly gross salary is:

- for trainee teachers: 2,447 ZLOTY (640 Euros ca),
- for contract teachers: 2,716 ZLOTY (705 Euros ca),
- for appointed teacher: 3,523 ZLOTY (897 Euros ca),
- for chartered teachers: 4,502 ZLOTY (1,145 Euros ca)

About 31% of respondents report no changes in their amount of incomes from other sources than teaching, although about 47% of respondents do not answer to this question, probably because they do not have other incomes from other sources. The majority of respondents (about 80% before the crisis and about 82% after the crisis) report that their performance is not related to pay incentives.

Costs

The size of teachers' family has not significantly increased after the crisis. About 51% of respondents report an increase in annual tax per property and about 24% of respondents observe no change at all. 58% of respondents observe no change in the number of their own properties and 7% an increase. Only a small percentage (15%) of respondents report a rise in their credits and loans – but about 28% of respondents prefer not to answer to this question. 35% of respondents have experienced no change in their monthly repayments of credits, while 24% of respondents observe an increase.

In terms of costs, the majority of respondents (about 94%) report an increase in monthly charges for gas and electricity. A big part (about 76%) of respondents also observes an increase in monthly charges for telephone and internet. About 59% of respondents observe an increase in monthly rent (mortgage) of their apartment or house and about 16% of respondents observe no change at all. As far as food costs are concerned, about 93% of respondents denounce an augmentation in alimentation costs. A similar picture can be observed for transports costs, as 80% of respondents report an increase.

Social benefits

There is a high percent of unfilled questions related to social benefits. About 50% of respondents observe no change in the amount of health care provisions, but 22% of respondents do not answer to this question. Only 11% of teachers answer the question concerning the amount of unemployment compensation, and only 3 out of 100 admit that they have noticed a moderate rise in the amount of unemployment compensation. About 95% of respondents skip questions concerning the pension for disabled; about 93% of respondents skip the ones on maternity benefits, and 92% of respondents do not answer questions on free/subsidised child care. In any case, half of respondents report no changes in the amount of social benefits funds.

1.2.2. Working Conditions

Class size

According to respondents, the pupil/teacher ratio has decreased after the crisis, passing from 15.5 to 14.6, on average. This is connected to the decrease in the number of students in schools from tested areas. The result may be exaggerated, however, because many respondents fill in the form with the average number of pupils in their classroom, instead of providing the real pupil/teacher ratio.

School materials and infrastructure

Teaching material available in schools comprises books, albums, maps, charts, computers, video/VHS/DVD, internet connection, but no projectors (about 5% of respondents before and after the crisis), no multimedia blackboards (about 15% of respondents before and 12% after the crisis), and no teaching software (about 3% of respondents before and 2% after the crisis). Apparently, the conditions of teaching material have not changed because of crisis and even slightly improved. As far as school infrastructures are concerned, according to respondents, their conditions before the crisis were somehow a bit worse than now. It seems, hence, that the condition of teaching materials and the infrastructural level of schools have both slightly improved in the last years. Head teachers and local administrators admit that schools have received financial support for the purchase of educational aids due to the implementation of the EU projects, as well as from the Ministry of National Education for the implementation of a new program, “A Joyful School”. Interviewed head teachers also underlined the fact that municipalities (even in spite of their financial problems) do take care of the infrastructural level of schools. For example, one interviewed teacher reports that in Ruda Śląska the municipality is currently building a *gimnazjum*, in spite of the city’s financial problems (the high debt).

Working hours

The number of hours of work per week has increased from 18 hours and 40 minutes to 19 hours, as a result of changes in the Teachers’ Charter. The average number of extra working hours per week has decreased after the crisis, from 3 hours and 33 minutes to 2 hours and 54 minutes, which is presumably connected with the decreasing number of students in the schools from the tested areas. The payment for these extra working hours (in ZLOTY, per hour) has, on the contrary, increased after the crisis, rising from 36.83 ZLOTY to 39.52 ZLOTY (an increase of 0.75 Euros per hour). In terms of administrative duties, answers do not reveal any significant growth of duties or changes in how they are financed (if these are part of the teacher’s paid working time or not). A few interviewed teachers mention that changes in their administrative duties (especially running a teacher’s and school documentation) are connected with the implementation of the Curricula Reform in schools. The growth of the number of hours spent on preparing for classes is probably also connected with it.

Teachers' and students' evaluation

Teachers' evaluation is conducted by head teachers in the following ways:

- Observation of lessons (1 - 2 times per year);
- Teacher evaluation every 4-5 years;
- Teacher evaluation connected with the professional advancement category in the teacher career;
- Checking the teacher's documentation;
- Evaluation of questionnaires;
- Analysis of the results of students' tests.

When evaluation is connected with professional advancement in a teaching career, then its results can increase teachers' salary and number of duties. The increase of bonuses as well can be connected with the results of the evaluation. A (small) majority of respondents (about 52% before the crisis and about 51% after the crisis) report that the results of the evaluation have no impact on their work. Among those who believe the contrary, before and after the crisis, performance assessment apparently had consequences mostly in terms of increase/decrease in extra-salary bonuses (about 22% of respondents).

The (external) evaluation system for students in compulsory education consists of the following external standardized tests and examinations.

- At the end of primary school (at the age of 13), students sit in a general, obligatory test that enables them to start education in the lower secondary school, (*gimnazjum*). Test results provide pupils, parents as well as schools (i.e. the primary school and the lower secondary school) with information about the level of pupils' achievements. The test covers skills required in core curricula;
- At the end of the 3-year lower secondary school (age 16), students have a general, obligatory examination, the results of which are indicated on the *gimnazjum* graduation certificate. This examination checks abilities, skills and knowledge in the field of the humanities and science (and a foreign language as of 2008/09). The results of the test, together with the final assessment of pupils' performance, determine the admission to upper secondary schools.

All tests and examinations are organized by agencies – 8 Regional Examination Boards supported and supervised by the Central Examination Board. Some teachers also report about a test taken by students at the beginning of the 1st grade and at the end of the 3rd grade of primary school (at the beginning and at the end of early school education). A few teachers mention a test organized by the educational publishing house "OPERON". These tests are free for schools under the condition that these join the publishing house's program. Tests are organized as a trial before the state exam to be taken at the end of lower secondary school.

Students' attendance and behaviour

The majority of respondents have not experienced a reduction in students' attendance after the crisis, nor do they observe behavioural problems in school (about 53%). But about 33% (about 36% after the crisis) of respondents find the behavioural issues to be significant, particularly: physical or verbal aggression, lack of discipline and good manners, arrogance, ADHD (Attention Deficit Hyperactivity Disorder), parents not cooperating with schools, drugs (cigarettes and alcohol), absenteeism, lack of respect for teachers.

1.2.3. Status of Teachers

Type of contract

A few respondents have changed the type of contract from temporary to permanent after the crisis. The majority of respondents (92%) have a permanent type of contract (only 85% would say the same before crisis).

Training

About 13% of respondents admit that their access to training has been limited as a consequence of the global economic crisis, as they often must pay for their training, fully or partially. Deciding whether and how to participate to training is up to teachers themselves, in some cases (30%) in cooperation with principals.

Job satisfaction

According to respondents, the majority of teachers are 'decently' satisfied with their job, even if most of them occasionally face work-related psychological problems. These results have apparently not been affected by the global economic crisis.

1.2.4. School Restructuring

Restructuring measures

About 39% of respondents report that in their region schools have been closed, merged, or restructured as a consequence of the crisis, and they admit that similar trends can be expected in the near future. According to head teachers and local administrators, though, the direct reason for closing or restructuring schools is not the global economic crisis, but the diminishing number of students. This decrease is connected to a general population decline and, particularly, to the economic situation of regions where the survey has been conducted, as young people tend to leave economically and socially depressed regions to move to big cities. Apparently, then, according respondents views, even if the global economic crisis has not improved this situation, it cannot be blamed *per se* for the closing and restructuring of the schools in the tested areas.

In terms of measures adopted by single schools as a consequence of the crisis, then:

- about 10% of teachers answer that curricula have been reduced and some subjects have been cut,
- about 12% say that class sizes have been expanded,
- about 20% report that special education classes are being reduced,
- about 2% claim that foreign-language classes are being reduced

However, as a consequence of the decreasing number of students described above, schools tend to combine classes (for example: students from the 2nd and the 3rd grade have lessons together, at the same time and in the same classroom with one teacher). That is why many respondents report that class sizes have been expanding.

Lay-offs

The great majority (88% and 84%, respectively) of respondents report no lay-offs of teachers or administrative staff as a consequence of the crisis. Arguably, teachers are not afraid of being fired, which is surprising. As such, the majority of respondents (79% before and after the crisis, both among teachers and among local administrators) know nothing about the existence of compensation schemes for education staff that has been laid off, or about re-training programs offered.

1.2.5. Non Discrimination

Gender

Most respondents are convinced that gender salary gap in terms of real pay and discrimination in recruitment and dismissing do not exist in the country's education system. The 54% of respondents claim that women are proportionally well represented in administrative positions, but about 35% of respondents point out the opposite.

Access to maternity leave is regulated by the Labour Code. From the 1st of January 2009, maternity leave is longer and depends on the number of children born in one delivery⁴. During the period of maternity leave, the woman is entitled to a maternity allowance, which equals to 100% of the woman's salary.

Apparently, sexual violence and harassment and any other forms of discrimination against women do not exist in Polish schools, according to 90% of respondents. However, the high percentage of "I don't know" answers in replying to questions related to discrimination is very significant, and may be connected to the feminization of the

⁴ 20 weeks after the birth of one child, 31 weeks after the birth of two children, 33 weeks after the birth of three children, 35 weeks after the birth of four children, 37 weeks in case of birth of five or more children at once.

teaching profession in Poland. In fact, about 80% of teachers working in schools are women, and, as they are surveyed, they are not comfortable in replying to such questions and report therefore that the aforementioned issues do not affect them.

Minorities

The survey has been conducted in two different regions with a strong presence of minorities. The first one is characterized by a strong presence of national minorities: the Byelorussians and the Ukrainians in the Podlaskie Voivodship, 2 districts (*powiat*): Hajnowski (39.1% of all residents of the district) and Bielski (19.8% of all residents of the district). The second one is characterized by a strong presence of an ethnic group called Silesian in the Śląskie Voivodship, namely in 3 districts - the cities of Świętochłowice, Zabrze and Ruda Śląska. There is also a presence of Romany in the district of the city of Zabrze.

According to the law, Silesians are not a minority, but in the 2002 national census as many as 173,200 Polish citizens declare to be of Silesian ethnicity, and this may be the reason why some respondents answer that there are minority (Silesians) students in their schools. About 42% of respondents confirm the presence of minority students in their school, as such: Byelorussians 31.6%, Ukrainians 0.5%, and Romany 2.8%. The majority of respondents disagree with the statement that minority students are more likely to drop-out than native students, although about 34% of respondents confirm that there is an achievement gap between minority and mainstream groups' students.

About 51% (49% before the crisis) of respondents report that minorities have access to their mother tongue language. According to an interviewed head teacher in Zabrze, Romany students and their parents are not interested in mother tongue language education. Another head teacher reports about the existence of courses in Ukrainian as first language, which, after a few months, have been cancelled due to the gradual reduction of attendance by minority students'. According to the answers of respondents, the crisis has not brought any changes in the situation of minorities in schools.

Special needs' students

About 93% of respondents confirm the presence of students with special needs in their school, but no discrimination is reported. There is a system of special assistance, focused on pedagogical help (corrective and compensatory lessons), psychological help, speech therapy, individual teaching, help from other students, revalidation lessons and financial help. Respondents' answers concerning availability of assistance for students with special needs and discrimination against them do not show any significant changes as a consequence of the crisis.

School transportation

About 93% (about 91% before the crisis) of respondents claim that pupils have no problems with transport to and from school. But local administrators from rural areas complain about problems with organizing transport to and from school. It is a big challenge to organize a transport at 8:00 AM to one school (with the total number of 200 pupils) from 20 villages. In some cases the bus must drive about 15 km to pick up only one pupil. This is a big expense, especially for poor municipalities.

1.3. The Author's Perspective on National Results

According to interviewed head teachers and local administrators, the general subsidy from the State budget covers about 78% of the school funding. Self-governments (municipalities) cover about 20% of school funding. This proportion has not changed after the global economic crisis. Other school funds come from the EU, from sponsors and independent donors (donations from parents). Interviewed respondents observe a moderate drop in the amount of funds received from sponsors and a significant drop in the amount of donations from parents. **The crisis has worsened the already bad situation of economically disadvantaged groups in the tested area.** However, local administrators and head teachers do not observe any impact of the global economical crisis on schools. This can be explained with the fact that the study focuses on small schools in economically and socially depressed regions (rural areas and small towns), which have been facing a resource crisis for many years, not just in the last few years⁵.

Some of the respondents claim that the overall situation in education is even better than a few years ago. Nowadays, schools receive funding from the EU. Every year, schools participate in different EU projects. Moreover, all interviewed head teachers and local administrators point out to the role of collective agreements in setting teachers' salaries and working conditions as crucial and basic. Therefore, **the global economic crisis has not improved the situation, but, definitely, the crisis alone cannot be blamed for the negative trends affecting national education.**

⁵ "Educational institutions in our area have been facing a constant crisis for a long time now and the global economic crisis has not changed anything in this situation," states one local administrator.

2. Slovakia⁶

2.1. The National context

In the school-year 2009/2010, the enrolled student population in Slovakia schools was the following:

- 138,496 children in 2873 *kindergartens*,
- 448,371 pupils in 2224 primary schools,
- 94,019 students in 249 secondary (grammar) schools,
- 189,265 students in 487 secondary technical schools and vocational schools
- 2,275 students in 14 conservatories,
- 1,718 students in 3 Ministry of Defence secondary schools,
- 35,449 children in 404 special schools at all levels of education,
- 2,329 children in 62 schools allocated to hospitals,
- 144,018 students at 32 universities (1st and 2nd level of tertiary education),
- 5,582 PhD students.

Moreover, 11,421 students studied part-time (on external basis) at grammar schools and secondary schools, and 80,527 external students studied at universities (including 5,367 PhD students).

The school year generally comprises 187 days of instruction between September 1 and August 31. The national educational programme defines compulsory curriculum. School educational programme have to be in accordance with the national educational programme and must be approved by the Ministry of Education. The compliance is verified by the State School Inspection Agency.

The most common language of instruction is the Slovak language; 92% of students at pre-primary, primary and secondary level of education attend Slovak schools in total. However, there are also schools offering full instruction in other languages: Hungarian (6% of students), Ukrainian (0,9% students), and less than 1% of students for Ruthenian, German, English and Bulgarian language of instruction. There are also bilingual schools at all levels of education. Some languages are taught only as a separate subject (such as Romani language, taught at only a few schools).

Schools can be administered by public authorities (municipalities, regions, and the state), church entities or private founders. Compulsory education lasts 10 years and is generally

⁶ The background country case study has been prepared by Martina Kubánová, from the Slovak Governance Institute

cost-free – only churches and private schools can charge tuition fees. School catering is subsidised for all students, state reimburses the travel costs of pupils in compulsory education if they have to commute out of their village if there is no public school in it. Parents/pupils have a school choice, if there is a vacant place at any pre-primary or primary school, they can enrol their child in it. The school in the place of their residence is obliged to provide education to all the pupils who reside in its respective area.

There is a centralized testing in the 9th grade of primary school and its results must be taken into account by secondary schools in their admission criteria. Secondary schools can also organize their own entrance exams as supplementary admission criteria. At the end of the 4-year programmes of secondary education, there is a centralized testing (called *maturita*), which is a prerequisite to enter tertiary education. Currently, only a few universities fully accept centralized testing results in their own admission process, and applicants have to pass entrance exams at individual universities or faculties to be admitted for tertiary education.

2.2. Analysis of the collected data

The case study for Slovakia is based on a questionnaire survey undertaken in 11 localities, with 83 teachers, 11 head teachers or deputy head teachers and 8 municipal actors (deputies, mayors, or local administration staff). The emphasis has been placed on capturing small schools and schools attended by minority pupils. The sample includes one primary school with Hungarian language of instruction, two special primary schools attended mostly by Roma pupils speaking largely Romani language, several primary schools attended by Roma pupils speaking mostly Slovak or Romani language. The sample covers 5 schools with more than 250 pupils and 6 schools below that number (schools with less than 250 pupils have a small financial subsidy because of their size compared to other schools).

Slovakia has 4 main regions, and the survey covers all of them. These are further divided into 8 smaller regions (*kraj*): Bratislavský *kraj* SK 01 (Bratislava Region) – comprises only this single *kraj*; Západné Slovensko SK 02 (Western Slovakia), i.e. Trnavský *kraj* plus Trenčiansky *kraj* plus Nitriansky *kraj*; Stredné Slovensko SK 03 (Central Slovakia), i.e. Žilinský *kraj* plus Banskobystrický *kraj*; Východné Slovensko SK 04 (Eastern Slovakia), i.e. Prešovský *kraj* plus Košický *kraj*. The survey has been conducted in 11 localities in 6 regions (6 *kraj*), both in urban and rural schools (the urban localities where in all cases other than the centres of these regions): Bratislavsky, Trnavsky, Trenciansky, Nitriansky, Banskobystricky, Zilinsky, Presovsky, Kosicky.

2.2.1. Financial Issues

Overall education financing in Slovakia

According to the Ministry of Education's reports on school financing, funds assigned to local schools (primary schools, secondary schools and special schools within the domain of MoE budget) moderately increased in nominal terms in the last three years. Almost all interviewed head teachers complain that the financing formula of schools in Slovakia is not good enough, because of low funding in general. Two head teachers perceive a deterioration in the level of funding after 2008: in one case, the head teacher complains that *kindergartens* (fully funded by municipalities from the personal income tax)⁷ receive less funds for education because the financial crisis has resulted in a drop in the collection of personal income taxes, which are the main source of financing all school facilities (see Annex I on Slovakia). The other head teacher feels that the situation is worse for larger schools, since the provisions of the Education Financing Act enable some relatively small subsidies to be channelled to smaller schools with less than 250 pupils.

Teachers' wages

The Government *manifesto* usually includes objectives related to the increase in education financing and, in particular, of teacher wages or to the equalization of them with the national wage average. But, after 1989, wages in education sector (excluding universities) remained moderately below the national wage averages; however, when only teacher wages at local schools are concerned (and not all the school staff), these are slightly over the national average (table 1). The current government *manifesto* for the election period 2010-2014 does not identify any measurable goal with respect to teachers' wages. The Institute of Information and Prognosis in Education publishes average nominal monthly wages desegregated by type of educational institutions and distinguishes between teachers and other staff in schools. Wages in the education sector as a whole (excluding universities) are below the average wages of other professions within the country, for teachers only, they are approximately at the level of the national average wage, and most respondents in schools complain that the wage scheme does not take into account that teachers have a high qualification (tertiary education). Apart from complaints on low wages, some head teachers point out other issues, such as small chances for taking into account individual performance when setting individual teachers wages.

Table 1 Average nominal monthly wages in the education institutions in 2009 (EUR)

	All staff	Teachers only
Educational Institutions from Pre-primary, Primary to	651.04	743.65

⁷ Unlike schools, *kindergartens* and other school facilities (school catering, afterschool clubs, extracurricular centres, etc.) receive their funds from municipalities based on redistribution of personal income tax between municipalities according to number of pupils and other criteria. As the taxes collected plummeted because of crisis, these facilities were first to receive less funding.

Secondary Education Total including diverse school facilities like Extracurricular Centres, School Catering, Psychological Counselling Centres, Boarding Houses etc.		
Kindergartens	571.55	635.23
Primary Schools	704.61	780.33
Secondary Schools – Grammar Schools	726.42	789.28
Secondary Schools – Professional and Vocational Schools	715.78	787.94
Special Schools at all levels in total	722.16	778.22

Source: Institute of Information and Prognosis in Education, <http://www.uips.sk/statistiky/casove-rady>

Teachers' own perception of their financial situation

More than three quarters of teachers feel that the living costs increased, mainly the current household consumption (89% of teachers report small increase or large increase) and monthly charges for their housing, like electricity, gas, water, etc. (88% of teachers report small increase or large increase). On the other hand, as far as the gross monthly wage is concerned, 55% of interviewed teachers perceive that their gross wages have moderately increased after 2008, 35% perceive that it has not changed at all. 51% of teachers report there has been no change in their bonuses or performance-related pay, and 30% report the decrease of bonuses they get. 70% of teachers report no change in income from other than teaching job, and 26% report an increase of such income. Slightly more than half of teachers (53%) say there has been no change in credits and respective monthly repayments of their households, while the other 47% claim their credits and repayments increased. As much as 79% say there has been no change in social benefits their households are eligible to, usually child allowances and pensions.

2.2.2. Working conditions and status of teachers

The Labour Code in Slovakia limits the maximum working time per week to 40 hours. The working time for teachers differs at individual school from 37.5 hours to 40 hours, but in many cases teachers are not sure about the exact time, because they focus on their weekly instruction time and overtime hours they agree to in their individual employment contract. The average instruction time in the sample has slightly decreased after 2008 from the 23.3 hours a week to 22.9 hours. Overtimes have remained roughly the same during the whole period: 1.35 hours a week on average. In most cases (84%), payments for overtimes as well have remained the same during the whole period. Approximately, three quarters of teachers have an employment contract without the time limit set, the rest of teachers have a contract for a limited time and two respondents report that their contract is as short-term work agreement for part-time work.

When questioned about their career plans, roughly half of teachers say they plan to increase or supplement their teaching qualification (both prior and after 2008). Another large group (38%) plans no career change. Several small groups (less than 5%) either want to leave the teaching profession, or to find a second job alongside teaching or change the school. Administrative burden is a hot issue in most schools and the situation even worsened after 2008 due to the new school reform. Teachers complain that they have to create more plans and documents, while instructions from upper levels change several times a year. Furthermore, they have to collect signed documents from parents about their informed consent for each activity they want to undertake with children, even though the activity takes part during the instruction time⁸.

Working conditions at school

The most problematic situation seems to be access to textbooks. Two thirds of teachers report that the situation since 2008 is much worse than before. This is a result of a too quick and unprepared school reform in 2008, and the consequent delays in creating new textbooks. Another area of worsening performance is concerned with pupils with behavioural issues and attendance and school results of pupils at schools in general. 67% of teachers report the worsening of situation with them. Moreover, 42% of teachers report worsened attendance of pupils in their own school, while another 32% of teachers report no change since 2008. Also, 45% of teachers report worsening of learning results of children at their own school, while 28% of teachers report improving and another 28% say there was no change since 2008. Worse trends are reported in schools with higher share of children from socially disadvantaged background or schools with Roma pupils. On the other hand, school infrastructures have apparently been improved since 2008 – 73% of teachers report that the situation is either much better or slightly better than before. Another area of improvement is lifelong learning: 56% of teachers say that, since 2008, their access to lifelong education has improved.

Slightly more than a half of teachers say there has been no change in their overall work satisfaction in the last three years, and no changes with their work-related problems. The education reform in 2008 has resulted in reforms of instruction time and class sizes. When

⁸ In the words of primary school teachers:

“Prior to 2008, we had to prepare one plan of lessons, now we have to supplement it with 10 other documents.”

“The school management does not know how the different plans we have to prepare should look like and neither the school inspection knows it. So we have to adjust and change it all over the year according to new instructions.

Informed consents of parents are another burden; we have to get it for each activity we want to undertake with children outside the school area. Even if I want to show my 2nd graders the surroundings of our school as part of a lesson, I have to get signed consent from all the parents! Documentation required for special needs pupils integrated in classrooms takes much time as well: for example one such pupil has a 40-pages record and some teachers have 5 to 15 such kids in a classroom, especially the gifted children.”

“Prior to 2008 we could manage the administrative work, but now it is too much and it irritates me, it is stressing!”

teachers are questioned about changes in instruction and education setting at school in their region, most would agree that:

- the number of foreign languages classes has increased (80% of teachers),
- the number of extracurricular/after-school classes at school has raised (63% of teachers),
- parental payments for education-related items at schools have augmented (63% of teachers),
- class sizes have decreased (46% decreased, 35% not changed),
- the number of special classes has not changed (54% not changed, 39% number of special classes has increased),
- total instruction time at school has increased (53% increased, 44% not changed); however, the school management questioned reports differently, i.e. 45% say it has not changed, 36% say it has decreased

Role of trade unions

The teacher trade union in Slovakia (*Odborový zväz pracovníkov školstva a vedy na Slovensku*) with its 60,000 members is the second largest trade union in Slovakia. The Statistical Office reports that there were 162,000 employees in the whole education sector in 2009 (79% of them females). So the estimated share of trade union members among education sector workers might be around 37%. The share of interviewed teachers that are members of trade unions is 41%. In 2009/2010, there were 99,852 teachers in schools, ranging from pre-primary to tertiary level of education (non-teaching staff not included, also different school facilities like language school, extracurricular centres, etc. are not included). In that, 15.8% worked part-time. Interviewed head teachers (all but two of them) are not really aware that trade unions have a role in influencing teacher wages. They see unions' role rather in checking that working conditions and issues concerning teachers work agreements at school are compliant with the Labour Code. The teachers' trade union in Slovakia offers legal counselling to its members if problems in these areas occur. Also, some other bonuses are available to trade union members, such as subsidies to spend holidays in facilities owned by trade unions.

2.2.3. School restructuring

The Ministry of Education reports a small decline in numbers of local schools, school founders and pupils in primary, secondary and special schools (i.e. local schools providing primary and secondary education), in line with the demographic trends of mild decline in number of newborn children since 1989. Declining numbers of pupils are mirrored in diminishing numbers of local schools, but, as the decline becomes slower and slower, so does the reduction in the number of employees and of teachers of local schools (table 2). In recent years, this demographic trend is reversed by a mild increase in numbers of newborn children, and the primary schools will experience it in the next decade. The new

trend of rising number of younger children is just now affecting *kindergartens* and the earliest grades of primary schools: in 2008 and 2009, for the first time since year 2000, there have been increases in teachers at 1st-4th grade of primary schools (including zero preparatory grades opened at some schools). This change has been to some extent also affected by the 2008 school reform, where the new Schools Act brought about decreasing maximum class sizes at all levels of education.

Table 2 Number of school founders, local schools, pupils, employees and teachers at local schools during 2006/07 - 2009/10

	number of school founders	number of local schools	% change	number of pupils in local schools	% change	employees in local schools	% change	in that: teachers	% change	pupil-teacher ratio for primary and secondary education combined
2009/10	1801	3239	-0,6%	785570	-2,8%	81 142	-0,4%	62 306	-0,6%	12,61
2008/09	1806	3259	-11,6%	807585	-6,3%	81 492	-2,0%	62 680	-2,0%	12,88
2007/08	1821	3638	3,2%	858166	-3,4%	83 155	-2,0%	63 943	-1,9%	13,42
2006/07	2006	3521		887221		84 840		65 178		13,61

Source: Ministry of Education Reports on School Financing 2007 - 2009, <http://www.minedu.sk/index.php?lang=sk&rootId=834>

Interviewed teachers often claim that they cannot estimate (42%) or they do not think (26%) there have been more schools closed, merged or rationalized during the last three years (2008-2010) after the start of the financial crisis. More than two thirds of teachers cannot estimate whether there have been more teachers or more administrative employees at schools fired in this period. Among the remaining third of teachers, the prevailing opinion is that teacher firing has not occurred in the last 3 years.

2.2.4. Non-discrimination

Gender issues

On non-discrimination issues, most interviewed people present similar experiences and opinions. The responses to questionnaires indicates that there is no problem with access to maternity leave in Slovakia and that there is no difference in real wages between men and women teachers (only two out of 81 teachers perceive that). Also, the vast majority of interviewed teachers do not perceive any discrimination between men and women when hiring and firing is questioned. Three cases of sexual harassment/violence have been reported by our respondents (all cases in a school with mostly Roma pupils), but it may be likely that people might hesitate to respond to this question in detail. The education sector in Slovakia employs mostly women: according to the Statistical Office's data, out of 162,000 employees in 2009 in the whole education sector, 79% were female workers. The

sample of schools interviewed in the frame of this study confirms this ratio: the average composition of teachers at interviewed schools was 3 men and 22 women teachers. This corresponds to the fact that 76% of respondents are in a school where women are represented in the school management.

Pensions and aged teachers

6,747 teachers are pensioners, and 1,400 of these teachers are in universities. The Ministry of Employment, Labour and Family announced in September 2010 its plan to limit opportunities to earn a wage alongside benefiting from the pension scheme, but, after protests especially from the Ministry of Education, where pensioners make up a very important share of teachers (every 11th teacher is a pensioner), the plan was rejected. Interviewed teachers do not perceive to be “pushed” to earlier retirement – no one has experienced that. But they claim that the higher share of part-time workers in schools is due to pensioners being employed to cover the lack of teachers for some subjects. Foreign language teachers, too, due to their ability to combine teaching with other jobs (e.g. teaching at private schools or language schools, adult language courses or private tutoring), are used to cover the lack of teachers. In total, half of interviewed teachers perceive the use of more part-time or flexible working time measures, while a quarter perceive the opposite.

Disadvantaged pupils

Almost half (46%) of teachers report that disadvantaged pupils are less successful in their studies and they claim this to be true more often for pupils from disadvantaged social background or minority children. Less frequently (in 8 out of 80 cases), lower success rates are reported among children with health disabilities. Most complaints about problems with learning achievements of their pupils were voiced at schools with a high share of Roma pupils, where teachers link such problems mostly to the lack of preschool education of these children and low education attainment of their parents, combined with lack of interest in child’s education by parents. In several cases, these problems are attributed also to inadequate curriculum for these children and the poor knowledge of the language of instruction by children. The sample includes also an urban school with several migrant pupils from Iraq, South Korea, Ukraine and other countries, and this school’s teachers complain about the inadequate curriculum and assessment criteria for children who only start learning the language of instruction – Slovak – when entering school.

Measures taken by schools

When commenting on measures against discrimination taken by schools, teachers most often mention that:

- in their own school teaching assistants are present (formerly a non-governmental initiative of Roma teaching assistants that later become adopted and mainstreamed by the Ministry of Education),

- their school opened a zero (0th) preparatory year, and
- they rely on co-operation with parents (either home visits or discussions with parents at school)

Some teachers, however, point out that their attempt to co-operate with parents is often not accepted by parents themselves. That is why a group of teachers declare to be therefore more motivated to propose tougher rules for parents whose children have a poor school attendance, if parents refuse to solve this problem during the compulsory school attendance. Other teachers report that their schools try to solve this problem by combining communication with parents with co-operation with school psychologists or psychological centres, remedial classes and tutoring and organizing after-school or extracurricular activities. Almost half of teachers (those who report having disadvantaged students and taking measures at school level) cannot think of any useful measure at higher levels (e.g. municipality, Regional School Office, Ministry of Education) that would help disadvantaged children achieve better results at school. Some teachers are frustrated by their inability to solve these problems⁹.

The other half of respondents proposes different measures:

- Investment in school infrastructure. Teachers at one school propose that the Ministry allocates investment funds so that a new school can be built in their municipality as the only school there is overcrowded, uses all available rooms even in the municipal office and has no school facilities like playground or gym. In another school, teachers ask for more funds from the municipality for reconstructing the school and establishing a lab for crafts and housework to be used more by children attending special classes.
- Stricter rules against school absenteeism. Teachers from different locations, mainly from schools with higher share of children from disadvantaged social background or Roma pupils, propose that the government adopts stricter rules to combat high absenteeism among these children. They suggest various measures ranging from:
 - cutting social benefits the family is receiving in case of high absenteeism,
 - changing the subsidy system in favour of pupils from low-income families – they especially stress the need to link any subsidy with school attendance

⁹ "It is a vicious circle – social affairs bureau, police, court, back to social affairs bureau, teacher, police, and court and so on, and so on. And there is no solution until the pupil leaves the compulsory education at the school, because the parent does not agree with transfer to special education."

"My experience with problem pupils is the following: I ask the psychologist to help solve the problem, then the social affairs bureau, try to contact parents, I write minutes, pupil profiles, draft measures to be taken, all with no results. Then again in the same round, problems with pupils remain the same, I write and try to solve it, bureaus write and solve and then the school-year is over, and then the next one and the next one and then the pupil ends the compulsory education."

- and change the scholarship system so that it is again bound to average grades per school year, not only attendance,
- o better law enforcement with respect to attendance of compulsory education and giving more powers to teachers, police force and municipality,
- o transferring certain children causing serious problems to diagnostic institutes or boarding schools
- Measures to solve inadequate social situation of families. A smaller group of teachers proposes to solve the social situation of families – living conditions, housing, etc. Some teachers are sceptical about forms of help from outside the family, if the family itself does not work.
- Different setting of education for socially disadvantaged pupils. Several teachers mention that, if more disadvantaged children are in one classroom, then the classroom's maximum size must be decreased. Other teachers request compulsory attendance of after-school activities provided by the school during the whole period of compulsory education. Several teachers request more funds: e.g. subsidies for better equipment in classes, school aides, subsidies for schools to provide cost-free tutoring and free after-school activities to these pupils.

2.3. Concluding comments by the author

The survey performed in Slovakia suggests that **it is not the financial crisis *per se* having a stronger impact on current situation at schools, but, rather, the recent education reforms launched by the former government, whose effects have been worsened by the crisis.** In particular, the new Schools Act (Law no. 245/2008, in force since September 1, 2008, that has replaced the many times amended old Schools Act adopted in year 1984) focuses on these core issues:

- Creation of the two-level curriculum system. The government sets the compulsory curriculum in the State Educational Programme, and schools profile themselves in the School Educational Programme. The Curriculum Board has been established, as an advisory body of the Minister of Education. Curricular changes resulted in changes in the textbooks for different grades at primary and secondary schools;
- certain changes in the process of admission and termination of education, monitoring and evaluation of education, education and training for children of foreigners, gifted children and pupils, education and training of children and pupils with special education needs;
- changes in the levels of education achieved to reflect international ISCED classification;
- changes in the organization of secondary technical schools, system of counselling, etc.;
- state subsidy introduced to cover free education and training of children in *kindergartens* in the last year before starting compulsory school attendance

As such, the new Schools Act in 2008, the new curricular system and the new teacher career system (since 2009) brought about smaller class sizes and more emphasis on foreign language classes and teacher's on-the-job training, but, on the other hand, these changes were accompanied with more administrative burden, lack of new textbooks and teachers complaining about the new career system rules. The picture would be slightly different if the focus of this study was also on other education facilities financed exclusively from municipal funds, coming from the central redistribution of the personal income tax. These are, for instance, *kindergartens*, extracurricular centres, after-school clubs or primary schools of arts and were more affected by the drop in municipal resources. However, **the study presents an important finding about the alarming situation at schools with higher shares of disadvantaged pupils, mostly pupils from socially disadvantaged background or minorities.** Teachers report **worsening trends in attendance and school results,** connected to the situation of disadvantaged pupils in their own schools.

3. Romania¹⁰

3.1. The National context

In the school year 2008/2009 the total of enrolled population in education was 4,324,992 with the following distribution by level of education¹¹:

Pre-school education: 652,855 students

Primary education: 859,169 students

Secondary education: 893,166 students

Vocational education: 189,254 students

Post-secondary education and foremen education: 55,089 students

Higher education: 891,098 students

The official language of instruction is Romanian but, for all levels, teaching is also given in the language of linguistic minorities (Bulgarian, Polish, Hungarian, German, Serbian, Ukrainian, Czech, Croatian, Turkish, Romany, Russian and Slovakian). Compulsory education lasts 10 years and is divided in three phases: primary education (4 years), first phase of lower secondary education, general, (4 years) and second phase of lower secondary education, which provides general, specialised or vocational courses (2 years) (see Annex II on Romania). Compulsory education, including schools of all levels, extra-school activities and auxiliary units, is subordinated to the Ministry of Education, Research, Youth and Sports through the county school inspectorates acting decentralised specialised bodies at local level.

Each county school inspectorate evaluates annually the education system at the county level and, based on this evaluation and the national educational policy, establishes the management plan for the next school year – detailing objectives, activities, resources and responsibilities. The management plan is discussed with the consultative bodies, such as the local development committees for social partnership in VET, or the consultative council of the school inspectorates (including heads of schools, highly estimated teachers, representatives of parents, of local public administration authorities, of economic agents and of other social partners/ stakeholders), and when it is approved by the administration council of the county school inspectorate, the management plan becomes mandatory for all managerial structures of the education system at the county level. Management of pre-tertiary educational institutions is ensured by heads of schools. When exercising their managerial duties, heads of schools rely on an administration council (school board) and on teachers' council. The administration council of the school, with decision role in the administrative area, comprises 5 to 11 members and is currently chaired by the head of

¹⁰ The background country case study has been prepared by Eugen Palade, independent researcher.

¹¹ Source: *Romanian Statistical Yearbook – 2009*. National Institute of Statistics, Bucharest, 2010

school. The teachers' council of the school comprises all teaching staff of the school, regardless of their specific employment status (permanent or substitute teachers), and is chaired by the head of school.

The school year (2008/09) comprises 35 weeks of teaching/learning, divided in two semesters. Courses are distributed over five days a week. The number of teaching/learning hours (lasting 50 minutes) per week varies from 18 to 20 in the first years of primary education, from 24 to 30 in the last years of the first phase of general lower secondary education, and up to 30 in vocational schools, or 32 in the lower cycle of high school respectively.

The number of pupils per class required by law is between 10 and 30¹². The average class size is 20. At the lower secondary education level, pupils, who are two years or older than the rest of their class, can attend evening classes. In primary schools, all subjects are taught only by one teacher (except for religion, foreign languages, physical education and music). At secondary level, teachers are authorised to teach only one subject. In 2008/09, the number of pupils per teacher was 17 at primary school level and 11 at lower secondary level.

The curriculum framework for primary and lower secondary education, set up by the Ministry of Education, Research, Youth and Sports, allows schools to design their own timetable schemes. This includes the core curriculum and the school-based curriculum. Subjects are grouped in seven curricular areas: language and communication, mathematics and natural sciences, people and society, arts, physical education, technologies, counselling and guidance. Teaching methods are not imposed by official regulations, but subject curricula recommend active learning, a student-centred approach, alternative evaluation methods, as well as recommendations concerning selecting/using alternative textbooks, homework, and ICT in education. The teacher is fully responsible for choosing the methods, taking into consideration teaching aids available, students' age, and following the general methodological guidelines provided by the national curriculum and the teachers' guides.

Pupils are assessed by teachers throughout the school year. The evaluation of students' results includes continuous assessments (oral examination, portfolio, projects, systematic observation of students' behaviour etc.) and summative evaluation methods (tests applied once per semester). At the end of primary school, pupils move automatically on to the next level (with no final examination). At the end of the grade 8th (end of first phase of lower secondary education), based on a selection and repartition procedure established by the Ministry of Education, Research, Youth and Sports, the students have access to the second

¹² Source: *Eurydice, National summary sheets on education systems in Europe and ongoing reforms*, 2010 edition

stage of Lower secondary education that is organised in high schools. The selection procedure is based on the average scores reached at the end of the first phase of general lower secondary education. This students' evaluation system will be drastically amended by the new Law of Education.

According to the Teaching Staff Statute (Law 128/1997), teachers are hired by the county school inspectorates on the basis of an examination organised at the national level by the Ministry of Education, Youth and Sports. They are ranked according to the obtained scores and have the chance to choose one position from the list of teaching positions they are competing for. The teaching position can be permanent or temporary. If a teacher succeeds to get access to a permanent teaching position, her/his working contract will be a full-time and permanent one. In theory (and very many times in practice), such a teacher can end her/his professional life at that specific school. Non-permanent teaching positions (that can disappear in the following year, depending on demographic evolutions and on the attractiveness of the school educational offer) are covered by teachers having temporary (one year) working contracts. This kind of contract can be extended at the recommendation of the school principal. Annual national competitive examinations are organised each year by MoE for covering new teaching positions or for those teachers that want to move from one school to another.

Generally, in Romania teachers can teach only one subject, the one mentioned on their personal graduation diploma (Mathematics, Physics, History, etc.). Those teachers teaching a different subject, e.g. a Math teacher teaching Physics, are considered as unqualified and paid accordingly (less). According to the provisions of the teaching staff statute, evaluation of the teaching staff and management, guiding and control personnel is performed annually on the basis of the evaluation fiche elaborated by MoE. The evaluation fiche is correlated with the job description of the respective position and is based on a quantitative rating system (1 to 100 points scale). Evaluation of the individual professional performances is performed according to a set of competence units, each one detailed in specific performance indicators.

The salary of the teaching and auxiliary teaching staff comprises the basic salary established according to the law, and a variable part consisting of supplements, indemnities, incentives and other rights. The supplementary salary rights and other rights of the teaching and auxiliary teaching staff are negotiated, within the limits established by the law, between the administration and the teachers' trade unions and are set in the collective labour contracts. Teachers' basic salary decreased this year by 25%, as a consequence of the economic crisis, while most of the indemnities and incentives have been severely reduced (see details in table 3 below).

Table 3 **Public expenditures in education**

Year	2002	2004	2005	2006	% variation (2002/2006)	2007	% variation (2004/2007)
Public spending on education total percentage of GDP¹³	3,6	3,3	3,5	4,3	+ 19,44	6 ¹⁴	-
Public spending on education as total percentage of public spending	Not available	8,58 ¹⁵	14,27	Not available	-	17,54	+ 104,42

In order to ensure the economical and financial stability of the country and to keep under control the effects of the global economic crisis, the Romanian Government has contracted two loans, as follows:

- May 04, 2009, a Stand-by Arrangement has been signed with the International Monetary Fund and the World Bank for a Loan in a value of 12,95 billion Euro¹⁶;
- May 06, 2009 – a Memorandum of Understanding and a Loan Agreement for an amount of up to 5 billion Euros have been signed with the European Union¹⁷.

A comprehensive anti-crisis programme has been agreed with the international financial institutions with the aim to normalise financial conditions and to reverse the economic imbalances. The anti-crisis programme does not include specific conditions for the education sector. However, education has been affected as a part of the budgetary system by:

- The reduction of expenditure in human resources in the public system by 4% in 2009 against 2008, by downsizing the number of the employees in the public sector, and freezing any salary increase (June 2009);
- The reduction of all personnel spending (including in the local governments and self-financed entities) by 15,5 %, corresponding to a reduction in working hours equivalent to 10 working days (between October and the end of December 2009)¹⁸;
- Cuts on any incentives and overtime hours (between October and the end of December 2009)¹⁹;

¹³ Source: Report on the status of national education system - 2008. Ministry of Education and Research, Bucharest, 2008

¹⁴ Value estimated by Ministry of Education and Research.

¹⁵ Source: UNESCO Institute for Statistics

¹⁶ Source: Urgency Ordinance of the Romanian Government to approve the Stand-by Arrangement has been signed with the International Monetary Fund and the World Bank, on http://discutii.mfinante.ro/static/10/Mfp/pachet_acorduri/OUG_99_2009_ratificare_Aranjament_standby_RO_FMI_092009.pdf

¹⁷ Source: Urgency Ordinance 82/2009 for the approval of the Memorandum of Understanding and the Loan Agreement signed with the European Community on http://discutii.mfinante.ro/static/10/Mfp/pachet_acorduri/oug%2082p2009.pdf.

¹⁸ Source: Letter of Intentions, Bucharest, September 08, 2009, on http://discutii.mfinante.ro/static/10/Mfp/pachet_acorduri/Letter_intent_sept2009.pdf

- The reduction of the salaries of the public sector by 25% from the 1st of July 2010 until December 31, 2010²⁰.

At the same time, the Memorandums of Understanding with the International Monetary Fund and the European Union include long term measures to downsize public expenditures as implementation of a new legislation unifying the public wages system, and the reform of pensions based on the principle of individual contributions to pension and the abolishment of laws and regulations that introduced the so called 'special' pensions in different budgetary areas.

The government education reform plan

The education reform in Romania started in 1995, but after a short period of enthusiasm and political willingness (1997-2000) very little progress can be reported. Modest performances of the Romanian students at PISA and other international tests, as well as internal evaluation reports²¹ prove the low effectiveness of the Romanian education system as a whole. Starting from these findings, the Ministry of Education launched a public debate on a new draft Law of education aiming at introducing new structural changes in education and at achieving EU standards and benchmarks. The draft Law was approved by the Government and sent to the Parliament for debates and final approval at the beginning of 2010. The draft Law has been already approved by the Chamber of Deputies, with modification, and it is currently being discussed by the Education Committee of the Senate.

It is a pure coincidence that the new Law of Education is discussed in this crisis time. The proposed changes are not directly related to the impact of the economic crisis on education, but some of the proposed changes aim at increased efficiency of the public spending in education. The draft Law is a comprehensive one, addressing all levels of education, curriculum, assessment and evaluation, teachers' professional status, school management, financing of education, school network, decentralisation etc. The main proposed changes are:

- Structure of the education system: According to the draft Law, the compulsory education in Romania lasts 10 years, but it will start with the last year of preschool education and include the primary education (4 years) and the lower secondary education (5 years).
- Class size: The minimum number of students in a class increases from 10 to 15.

¹⁹ Source: Law 118/2010 regarding some measures needed for rebalancing the State Budget on http://www.dreptonline.ro/legislatie/legea_118_2010_unele_masuri_necesare_vederea_restabilirii_echilibrului_bugetar.php

²⁰ idem

²¹ *Needs and priorities in educational changes in Romania*, The National School of Political Studies and Public Administration, 2007; *A Romania of education, a Romania of Research, a study of the Presidential Commission for Education*, 2007

- Total number of hours to be spent at school: The maximum numbers of hours students have to spend at school is not changed for primary and lower secondary education (20, respectively 25 hours), the maximum number of hours for upper secondary education is reduced to 30 hours per week.
- School based curriculum: The percentage allocated for the school-based curriculum will be extended to 20% in primary and lower secondary education and to 30% in upper secondary education.
- Students' assessment: According to the draft law, students should be assessed periodically, as follows:
 - at the end of 2nd grade – with the aim to improve the students' individual learning plans;
 - at the end of 4th grade – national assessment organised according to international practice; it aims at assessing the students knowledge and competencies at the end of primary education, and at improving students' individual learning plans;
 - at the end of 9th grade - national assessment organised according to international practice aiming at assessing students' knowledge and competencies at the end of compulsory education;
 - at the end of 12th grade – Baccalaureate
- Pre-service teacher training system: it will include:
 - Initial specialisation in a certain field (Mathematics, History, etc.),
 - Master in education,
 - one year of practice in a school under the supervision of a mentor,
 - national examination organised by the Ministry of Education
- Teaching staff employment/dismissal: The teachers will be hired by each individual school, following a contest organised at the school level, under the responsibility of the school head. Teachers that pass the national exam will get a full time, permanent, employment contract, but relevant just for that specific school.
- Teaching load: Teachers having more than 25 years of experience will have a teaching load of 18 teaching hours per week, and not of 16 as it is currently.
- School management: Schools will be run by the following institutions:
 - Council of Administration (School Board) of 7-15 members including representatives of the teaching staff (1/3), parents (1/3) and local council (1/3), responsible for budget approval, human resources management (including teachers), approval of school based curriculum etc.; the CA will be chaired by a president elected either from the representatives of parents or Local Council;
 - School Principal, hired either by the Mayor (primary and secondary schools) or by the Local Council (High Schools), after a contest organised at the school level;
 - Teachers' Council managing the teachers class activity, their professional development etc.

- School financing: Schools will be financed on per capita basis, according to a methodology to be elaborated by the Ministry of Education; money will follow the students both in public or private schools.
- Decentralisation of the educational system: Most of the proposed reform measures lead to a decentralised educational system where:
 - the school is run by a School Board dominated by the representatives of the local communities (parents and local authorities);
 - the school Principal is hired by the local community;
 - teachers are selected and hired by schools;
 - the school-based curriculum is strengthened;
 - the whole system is financed on a per capita basis

The school network optimisation process is conceived as a part of the decentralisation process, aiming at rationalising public spending in education. According to the initial plans, all schools having less than 200 students were supposed to change their legal status losing their status of independent schools (legal entity). Schools under this category were meant to become part of a school cluster run by the Principal of the central community school. The education budget is not supposed to be discussed, approved and administrated anymore at the level of each school but at the cluster level. A pilot project was launched in January 2005 in eight counties, but very little progress can be noticed until 2009.

3.2. Analysis of the collected data

The research has been conducted in 15 schools (see Annex II) selected either from rural or semi-urban areas of South, South West and Central part of Romania, inhabited by economical disadvantaged population and/or ethnic minorities. The most significant ethnic minorities represented in these areas are Roma, Hungarians and Serbians. The below conclusions reflect the opinions of:

- a group of 160 teachers, principals, and representatives of the of Local Councils that answered the questionnaires;
- 32 interviewed persons including school Principals, teachers, members of Local Councils and Mayors.

The age of the vast majority of the respondents spreads between 20 and 40 years. The group of respondents includes 31 male teachers (23.66%) and 131 female teachers (76.34%). The group of respondents includes 15 school Principals, 6 representatives of the local authorities and 139 teachers from preschool, primary and lower secondary education. The majority of teachers (51.65%) graduated long term programme studies at the university

level. The respondents group is dominated by teachers having between 11 and 20 years of experience (41.25%), followed by young teachers (27.50%).

The average number of students in the selected schools is 315.5, with a minimum in Comandau (87 students) and a maximum in Curcani (682 students). 10 schools are located in rural areas and 5 schools in semi-urban area. Most teachers are members of a trade-union (85.48%). According to the law, the school Principals cannot be members of a Trade Union.

3.2.1. Financial issues²²

Income

The calculation of teachers' salary in Romania starts from a fixed amount (299,933 Lei) that is multiplied with a coefficient reflecting single teachers' level of qualification (last school graduated) and experience in education (number of teaching years). To this basic salary, some incentives are added, such as the management bonus (for Principals) representing 35% of the basic salary, or "gradatia de merit" (a performance-related amount of 20% of the basic teacher salary), bonus for scientific titles (as PhD in education), bonus for working with children with special needs (15% of the basic salary), bonus for school counselling activities (10% of the basic salary), bonus for working in remote areas (from 5% to 80% of the basic salary), etc. Until 2009, teachers' salaries were calculated according to the abovementioned algorithm; in October 2009, a part of the bonuses was cut, while others were included in the basic salary; on the 1st of January, 2010, all salaries were recalculated according to a new algorithm (not decreasing, in principle); on the 1st of July 2010, the basic salary has been cut by 25%. According to respondents, the average salary in the education system before the crisis was: gross - 1958.39 Lei (453.33 Euro); net - 1411.26 Lei (326.68 Euro). After the crisis, the average salary decreased as follows: gross - 1366.15 Lei (316.23 Euro); net - 1040.68 Lei (240.90 Euro). Until 2008, teachers used to receive a 13th salary and a bonus of 2% of the total salary. The annual total net income before the crisis was 17141.42 Lei (3967.92 Euros) and it has decreased after the crisis to 12248.94 Lei (2835.40 Euros). Because of salary and additional payments cuts, such decrease has been quite substantial, as follows:

²² The exchange rate at date of report submission is 4.32 Lei for 1 Euro.

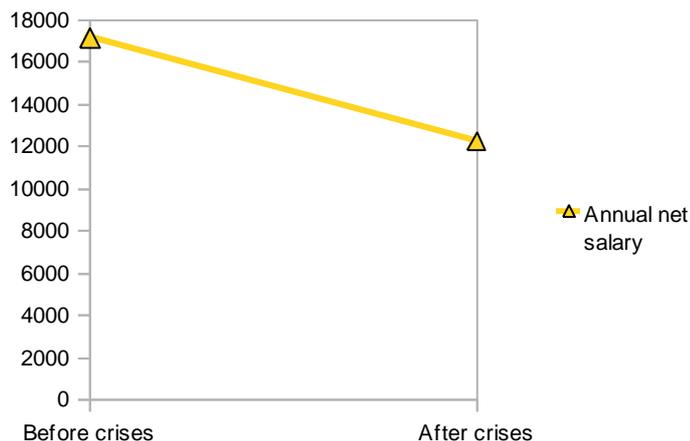


Fig. 9 Evolution of annual net income

Until the last school year, there were two kinds of incentives to reward the performance in education: (i) an amount of 2% out of the school teachers' salary fund that used to be distributed by the School Board to those teachers with special achievements at the school level; (ii) the 'merit salary' (*'salariaiul de merit'*) representing 15% of the basic teacher salary added to the regular salary for a period of 12 months following a recommendation of the Teachers Board and the decision of the School Board; (iii) a performance related amount of 20% of the basic teacher salary (*'gradatia de merit'*) given by the County School Inspectorates for a period of 4 years. On the ground of a 2009 decision of the Ministry of Education, the first two incentives have been cut. Just a few respondents mention the existence of a performance-related payment, although such incentives were in place till 2009.

The level of other family average incomes than the respondent's salary decreased after the crisis from 1040.82 Lei (240.93 Euros) per month to 901.24 Lei (208.62 Euros) per month.

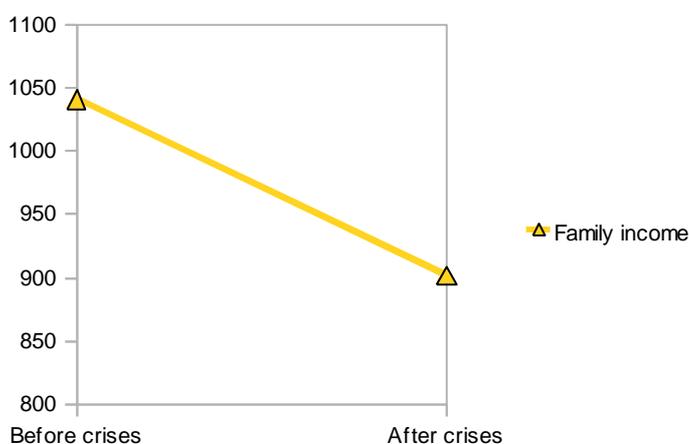


Fig. 10 Evolution of family income

Cost of living

The average size of the respondent's families is 3.15 persons (including the respondent), with a minimum of 1 person (11) and a maximum of 6 persons (2). Only 24 respondents declare that they have to pay a rent/mortgage for their apartment/house with an average value of 647.10 Lei (149.79 Euros)/month, slightly more than before the crisis – 638.00 Lei (147.68 Euros)/ month. A significant majority of the respondents own the houses/apartments in which they live and one car. Respondents from the rural area own land. Less than 10% of respondents have more than one property. The average²³ annual tax per property after the crisis is 374.18 Lei (84.54 Euros), having almost the same level as before the crisis – 365.25 Lei (86.61 Euros). In terms of credits to be paid back, 73 respondents declare that they have contracted credits for which they are paying an average amount of 645.25 Lei (149.36 Euros) per month (before the crisis). After the crisis, this paid amount has decreased to 626.01 Lei (144.90 Euros).

As far as costs are concerned, the average monthly charges for gas, electricity, etc. have slightly increased from 328.63 Lei (76.07 Euros)/month before the crisis to 356.27 Lei (82.55 Euros)/month after the crisis. The average monthly charges for Internet and telephone is relatively constant, 151.38 Lei (35.04 Euros)/month after the crisis against 143,35 Lei (33.18 Euros)/month before the crisis. The estimated average figure for the alimentation cost has increased, too, from 634.13 Lei (144.78 Euros)/month to 681.45 Lei (157.74 Euros)/month after the crisis. The average figure for transportation cost (excluding holidays and entertainment related costs) as well has increased by 7.59% after the crisis: 143.59 Lei (33.23 Euros) before the crisis against 154.49 (35.76 Euros) after the crisis.

Existence of social benefits

Opposite to rising costs, funds for social benefits are decreasing. The Health care charge decreased from 6.5% of the basic salary before the crisis to 5.5% after the crisis. The charge for unemployment compensation decreased from 1% of the basic salary to 0.5%. Finally, employees' contribution on retirement programmes decreased from 11.5% of the basic salary to 10.5% after the crisis.

Maternity benefits include a two years maternity leave (equally available for mother or father) with an indemnity of 85% of the basic salary paid one time. In addition, each mother is entitled to receive a bonus that represented the value of two gross salaries (before the crisis), but has decreased after the crisis to only one gross salary.

Pension schemes are available, but teachers do not know what to expect for the future. According to the current legislation, the retirement age is 60 for women and 62 for men.

²³ 31 respondents declare that they have properties, not mentioning though their annual charge.

The new pension law that has been submitted to the Parliament opts for an increase of the retirement age to 63 for women and 65 for men.

Working conditions

According to the Education Law, teachers in Romania have a workload of 40 hours per week, out of which 18 hours are classroom teaching time. The economic crisis has not impacted teachers' workload. Extra working hours are paid on a per hour basis. The value of extra teaching hours is calculated according to an algorithm, i.e. the basic salary divided by 72 (number of teaching hours per month) and multiplied by the number of extra teaching hours (over 18 per week). Teachers allocate on average 12.50 hours per week to prepare teaching activities and this is included in the paid working time of 40 hours.

According to respondents, the average class size before the crisis was of 20.89 children, almost the same number as after the crisis, i.e. 20.43 children. All respondents confirm their access to teaching materials. As for the quality of the available equipment and materials, 112 respondents say it is good; 30 respondents decent; 7 respondents describe it as poor. The quality of school infrastructures is assessed as follows: 82 respondents say it is good; 53 respondents decent; 8 respondents describe it as poor. However, all principals stress the fact that funds received from local authorities for school maintenance and repairs have decreased this year by 25%, as a consequence of the crisis.

3.2.2. Status of teachers

Type of employment status/contract

The vast majority of teachers in the target group schools have the same status, i.e. full time type of contract for 79.31% of teachers before and after the crisis. The economic crisis had no impact on their type of employment contracts.

Opportunities for CPD/training

After the crisis, teachers have access to the same kind of professional development opportunities as before, i.e. training courses accredited by the Ministry of Education to cumulate 90 professional credits each five years and any other courses meeting individual needs and requirements. Training fees are covered by each individual teacher, except for the courses organised by the Ministry of Education or other training institutions as part of teacher's development programmes and projects, as those that are funded through EU PHARE projects or Structural Funds. The decision to attend training courses is taken by each individual teacher, sometimes following the school inspector's advice.

Overall job satisfaction and work-related psychological problems

As an effect of the crisis and, especially, of the dramatic salary cuts, there is a general decrease in job satisfaction, even if not impressive – after the crisis, 40.29% of the respondents are very ('much') satisfied and only 14.92% are not satisfied ('little').

The most frequently mentioned psychological problem related to teaching activity before the crisis was the stress. After the crisis, the picture looks more diverse, 'the stress' being mentioned 71 times, followed by 'uncertainty' (45 times) and 'burnout' (24 times). Only 6 respondents mention 'pressure from peer competition' as a problem.

It is not surprising hence, that 35% percent of respondents indicate that they intend to leave their position under the current conditions, against 13% that would say the same before the crisis.

3.2.3. School restructuring

Restructuring schools – similar trends in the near future

When responding the questionnaire, teachers referred to their own school and in this context the number of schools restructured is not significant. More relevant are the findings of the interviews with Principals and Local Authorities and this confirms that the school restructuring process is starting to produce its effects. In Romania, the official discourse does not talk about closing schools, but, rather, about a school network optimisation process aiming at rationalising public spending in education. This optimisation process has started as early as 2005 and currently is being implemented. It includes the closing of small schools in remote areas with less than 10 students and the changing of the status of those schools having less than 200 students. Such clusters can include up to 10 small schools. The process has been sped up in 2009, and it is still under implementation all over the country, but the exact number of schools with changed status is not yet known. School network optimisation process does not equally affect the whole country, and we can easily identify two distinct situations. Those communities where the Roma minority is significantly represented (as in Calarasi County or in semi-urban areas of Bucharest) do not have problems with the school population, due to a constant high level of birth in Roma communities. Therefore, most of the schools with a dominant Roma population have a constant or an increasing number of students. The most significant consequence is that in this area there are no cases of closed or merged schools. On the contrary, there are examples of local authorities struggling for an extended school infrastructure, as in Curcani village, Calarasi County. In other regions, as in remote areas, both majority population and some minorities (Hungarian and Serbian) are decreasing and schools are closing down. In this case, students are transported with school buses to the central community schools.

As far as the length of the school year is concerned, there are no plans to shorten it. On the contrary, the current school year will have 36 weeks, one more than the previous one, but this is not at all related to the economic crisis.

Number of teachers that have been laid off

In the targeted schools, no teachers have been laid off; just two cases of teachers being laid off have been mentioned in the last school year, and no cases of administrative/support staff being laid off. There are two main reasons. First, there are regions where the number of students is not decreasing, therefore the number of classes and teachers do not decrease either. Second, in 2009, a decision of the Ministry of Education asked for a reduction of 15,000 teaching positions in the primary and secondary education system. The difference between the number of teachers and the number of posts is covered either by hiring part time teachers, or by sharing the extra number of hours between the full time teachers (these additional working hours are paid on the top of the regular salary, as a percentage of the basic salary). Under these circumstances, almost no qualified, full time teachers lost their job. What has been cut is either the supplementary number of hours shared among full time teachers (with a decrease of the monthly income), or those working loads covered by part time (sometimes unqualified) teachers. However, it is important to mention that no compensation schemes are in place for educational staff that has been laid off. Moreover, there are no re-training programmes specially designed for education staff in place, but teachers have access to the general re-qualification programmes organised by the Ministry of Labour.

3.2.4. Non-discrimination

Gender aspects

Figures show a clear dominance of women teachers (74.64%) in Romanian education. They are proportionally represented in School Boards, but the majority of the school Principals in the selected schools are men (8 out of 15). There is no mention, in our survey, of cases of violence or harassment against women in schools.

Women receive social benefits to conciliate their family- with their work-life. They have access to a maternity leave of two years, and receive 80% of the salary. Some of them can also opt for part-time or flexi-time measures.

Minorities

All students (also minorities') have access to mother tongue language education. However, in very many Roma communities, parents and students do not ask for learning in Romani Language, although the opportunity exists.

Both questionnaires and interviews show that the risk of school drop-out is more significant for Roma pupils, mainly because of their poverty (and, to a minor extent, traditions of early marriage). There are cases when they do not attend school because they do not have shoes or clothes, or when different members of the family share the same pair of shoes. On the other hand, it is obvious that school drop-out is not a mass phenomenon, even in Roma communities. Different Governmental social programmes (as “Snack and milk” implemented for primary school all over the country), or social support initiatives of local authorities represent strong incentives for Roma families to send their children to school. Another valuable reason for Roma children to attend school is the monthly allocation of 42 Lei received by all children in Romania. There are families where this is the only income, and it becomes particularly significant considering the usual size of Roma families. According to the interviewed Principals in Covasna County, instead, Hungarian children are stimulated to attend schools in Hungarian Language by receiving an annual stipend in a value of 300 Lei (approx. 80 Euro) provided by Hungarian Government through an NGO²⁴. Apparently, this is one of the reasons for which an important part of Roma children in Covasna County identify themselves as Hungarians.

Things are different when talking about students’ chance to enter high school: poor children (mostly Roma) do not have enough resources to cover the transport expenditures and/or school boarding. This happens in spite of the Law setting the compulsory education for ten years.

The majority of teachers notice a significant difference between school achievements of students belonging to the majority population and those reached by students belonging to Roma population. All interviews reveal that the main causes of this difference are poverty and lack of parents’ education. There are numerous examples of Roma children obliged to work together with their parents, mostly in agriculture.

Access to education for students with special needs

Students with special needs have access to special schools and special classes where they receive help by specially trained teachers. These schools include mostly students with severe mental and/or physical disabilities. As for the rest of the children with minor physical or mental problems, behavioural problems, slower rhythms of learning, they are integrated in mainstream schools. Due to budget shortages, according to all respondents, these children however do not have access to any kind of support.

3.3. Perspective of the author on national results

²⁴ The information has been provided by the school Principals in Covasna County.

After conducting the questionnaires, some weaknesses have been identified. First, for the respondents it was not clear what 'before the crisis' and 'after the crisis' means. Most of them refer to the school year 2008-2009 as a point of reference, but some of them are confused and not able to identify what 'after the crisis' means. Teachers appear very uncomfortable in filling in questions related to financial issues and ask for a few days for collecting data (a supplementary burden for the researcher). It is not usual for teachers in Romania to operate with concepts like 'gross salary' and, especially, 'annual income', an indicator which is not regularly used in Romania (working contracts in Romania in public sector just mention the monthly rate, not the annual income). In addition, for teachers in Romania the monthly salary is not the same as the monthly income, on the top of the salary a teacher receives in fact variable amounts of money, as the payment for additional teaching hours. This is why the question related to the 'annual income' has been skipped by a substantial number of respondents, and the way in which it has been calculated by those that answer is questionable. Also, the most part of teachers face huge difficulties in answering questions related to 'other social benefits' because of the lack of knowledge in this field. There is a lot of confusion on the age of retirement 'after the crisis' and their expectations related to the value of the pension. Under these circumstances, the accuracy of the figures within the 'financial issues' section is slightly questionable. However, even if not fully relevant as absolute figures, they tell something about the general trends.

The finding of our research shows that **some areas of school life have not been affected by the economic crisis:**

- the academic year has not been shortened, but extended with one week (school year 2010-2011 against the previous school year);
- there are no cuts in curriculum;
- the number of teaching hours for foreign-languages and guidance counselling has not been reduced;
- the class size has not significantly increased;
- special education classes have not been cut;
- no tuition fees have been introduced

Other areas of the school live have been clearly affected, and these are:

- Teachers' incomes have been severely diminished with the cut of most salary-related payments and the reduction of all salaries by 25%;
- A school network consolidation process is in place²⁵ with the aim of increasing the efficiency of public spending in education, by closing small, remote schools having a very limited number of students (less than 10), by using multi-grade education without though training teachers;

²⁵ There are no available official data showing the magnitude of the process.

- Funds allocated by the local authorities for school maintenance and other non-salary related activities have been decreased by 20%.

We also have to consider a set of side effects of the economic crisis on education, such as the increasing unemployment and poverty affecting the educational environment at home, the time parents spend supporting/helping their children, parents' investment in their children education, and so on, and the fact that diminished salaries for teachers mean less enthusiasm, less interest for professional development and for extracurricular activities.

4. Serbia²⁶

3.1. The National context

In Serbia, primary (compulsory) education lasts for eight years, starting at 7 years of age, and is divided into two cycles, each one lasting four years. Prior to these cycles, a preparatory educational period of one year is mandatory. Secondary education is provided in high schools. The certificate awarded at the end of secondary school is the Diploma (*Završenoj Srednjoj Školi*). Secondary vocational schools offer both general and vocational (practical and theoretical) education for direct entry in the world of work and further education. The language of education is Serbian.

Higher education in Serbia includes university education (faculties and art academies) and non-university education (post-secondary schools) where courses last no less than two years and no more than three years. Universities organize art and educational work, as well as other activities, in compliance with the law and its statutes. The faculty is an educational and art institution inside universities that includes basic studies, specialized studies, magisterial studies and doctoral studies. The basic studies last between four and six academic years. Specialized studies last between one and two academic years and magisterial studies last for two academic years. Doctoral studies last for three years. Faculties carry out independently, or in cooperation with another organization, their basic, applied and development research in function of educational activity development.

Pre-school teachers are trained for two years in specialized post-secondary schools or in universities for two years. Primary school teachers of Arts and Music are trained in post-secondary art schools (for arts and music). Primary school teachers (grades 1-4) are trained at a teacher training colleges (*Više Škole*) for four years. Grades 5-8 teachers must complete a four-year programme in Faculties of Philology, Philosophy and Sciences and Mathematics in the relevant study groups. Secondary-school teachers are trained in arts or science faculties. Courses last for four years. Starting from the second year, candidates follow classes in education and teaching methodology in addition to classes in their majors. During the first semester of the last year they may teach in a classroom. Further specialization for all teachers is required by law.

There are about 50 special schools in Serbia, including special primary schools (SPS), special primary and secondary education schools (SPSES) and special secondary schools (SSS). There are also mainstream primary schools (MPS) with special classes. Of these, 90% are for children with intellectual disabilities. In special classes in mainstream primary

²⁶ The background country case study has been prepared by Borika Visnic, Teacher Union of Serbia.

schools, multi-grade special classes predominate (64% in the 2007–2008 school year, 61% in 2008–2009, with lower quality of special education. In special schools on the primary level, multi-grade classes make up 14% of classes, and on the secondary level only one percent of classes for both school years. There is an overrepresentation of Roma students in special education: in the 2007–2008 academic year, the total number of students stood at 5,639, of whom nearly 30% (1,683) were Roma; in the 2008–2009 academic year, a total of 5,579 students, of whom 1,775 (or 32%) were Roma.

Enrolment in 2009 in primary education was 282,395 pupils, according to UNESCO Institute of Statistics (UIS). Enrolment rate in primary education (2008/2009) was 98.53% (attainment rate 94.91%), while the dropout rate 0.29%. For rural areas, the enrolment rate is 82% (while only 74% are graduating). For Roma children, the attainment rate drops to 21 - 37%. The Pupil/teacher ratio in primary school was 16.5 in 2000, 15.4 in 2005 and has dropped to 14.3 in 2008.

Public spending on education as a percentage of GDP was 3.35% in 2010. As a percentage of the national budget, public spending on education was 13.41% in 2010 and 12.73% in the plan for 2011. 48% of education budget goes to preschool and primary education.

Salaries of all employees in education (except for preschool education) are financed from the national budget. Preschool education is financed at the level of local communities, while programmes and standards are regulated at national level, and class preparation before elementary school is financed on the national level. The key obligation of local authorities is to finance schools' expenses on teaching materials, costs for maintaining buildings and in-service training of teachers. They also have the obligation to pay for travel expenses for employees, as well as for their jubilee and their Christmas awards. Local communities are also responsible for taking the final decision concerning the creation of school networks.

95% of the budget for education at national level is going to the salaries of employees in the education sector. There is, hence, no money for reform processes. So, reforms under way are financed by loans from the World Bank under its conditions and directions (the basis for reform is the World Bank analysis of the Serbian case in 2009, i.e. "To do more with less", when the Bank declared that 11.000 classes had to be cancelled). Under the IMF arrangements, conditionality imposes a 10% cut of employees in education (as well as other public sectors). At the same time, World Bank's loans impose effectiveness in education as main goal for the reform processes, introducing per capita financing of education, and programmes for the improvement of services at local level, education included. The reform plan announced by Government involves reform of curricula, reform of the class size (in its second year of implementation), and the reform of school network

and changes in the system of financing education (i.e. the introduction of the per capita system).

As far as rural school network is concerned, in 70% of the settlements with more than 100 inhabitants there is a 4-grade school (the so-called “small schools”), i.e. 2067 of 4-grade schools, with 3611 classes (3068 combined classes with an average number of students per class of 9,8). The equipment of these schools, as well as their facilities, is worse than those in “big” schools.

4.2. Analysis of the collected data

The survey has been conducted in 15 schools in Serbia, on 15 school masters, 174 teachers and 11 officials from local communities. In geographical terms, 2 schools are located in the province of Voivodina, 3 schools in the urban periphery of Belgrade, 7 in Central Serbia and 3 in South Serbia. In socio-economic terms, 6 schools are in rural communities, 8 in Belgrade’s periphery and 1 in a small town. The majority of schools visited are small schools, with 160 to 500 students, and only two have 1400 and 1500 students respectively.

4.2.1. School restructuring

In general, the number of students has decreased this year compared to the last one in 8 schools out of 15; however the number of classes has been reduced more dramatically. The average number of students per class has then passed from 12,9 to 26,6 in most schools. School restructuring has not overall concerned the country so far, even if some schools expect possible merging or closing, and their inclusion in school networks. Most of school masters believe that the rationalization of classes and the creation of school networks will have negative consequences on the position of employees and quality of education.

Broadly speaking, many teachers have not been able to achieve full time teaching. The problem has been solved by redistributing hours among teachers. Among the survey’s respondents, in fact, only 4 teachers and 3 supportive staff are left without job. Fired personnel can apply to the national employment service in order to obtain a compensation that lasts up to 6 months, depending on the years of experience (for example, people who miss only 2 years before their retirement can have longer compensation). The amount of this compensation has decreased in the last years and it is not enough for living. The employment service also offers some training for a small number of unemployed people.

State of infrastructures

School buildings are old, built in the years comprised from 1948 to 1986. The technical quality level of infrastructure, as observed by school masters, appears to be bad in 3 schools, decent in 8 schools and good in 4 (in one of them even excellent). Investments in

infrastructure have anyway been made in 10 schools in the last two years: works as recovering of roofs, repairing of installations and central heating, and so on. The main problems are water supply, the lack of space for sports, kitchens, sanitary installations, and in 11 schools, the planned projects have been postponed due to the economic crisis. In 5 schools school principals are satisfied with funding by local communities, but other stated rather bad situation that worsened in the last two years (expenses for schools are reduced, in service training is cancelled, only travel expenses are paid).

4.2.2. Non-discrimination

Gender issues

As women represent the great part of employees in the education sector, the implementation of women protection tools is very important. Women have the right to maternity leave for 12 months and receive 65% of their salary. The Belgrade region is an exception, as the compensation for maternity leave is 100% of women salary (thanks to an additional payment by the city administration). School masters declare that there is no difference between men and women in terms of full working time or part time, redundancy, employment and any other discrimination, sexual harassment or violation. Women are numerous in all schools among employees (one school is exception, with the same number of women and men) and they are well represented in administrative positions, too, even if still in minority (out of 15 school masters, 11 of them are men and 4 women).

Minority and refugee groups in schools

Roma children are present in all schools (more than 120 in two interviewed schools) and they are included in the school system with additional support of Roma assistants as the connection between family and school, i.e. assistants help students to achieve better results.

In Serbian schools, Roma children are the most important minority group. There are, however, many children from refugee families and internal displaced persons (from Kosovo). As Serbia is, in fact, the country with a high number of refugees, it has been very important in the last 15 years to find ways to integrate their children in the school system. As a result, now schools have a very high percentage of refugees, especially from families from Kosovo. As the location of these schools is mostly in rural areas, these children mainly come from villages nearby.

Students with special needs

Only few children with special needs are included in schools, with *ad hoc* support measures and support staff. They unfortunately have not received enough training to work with these children. Children from minority groups appear to be more likely to drop

out in three schools out of all schools surveyed, and in four schools they obtain poorer achievements. Only two schools declare they have the problem of transportation of students, but in general, discrimination in terms of school access has not been reported.

4.2.3. Financial situation of teachers

Salaries

Among teachers who have taken part to the survey, 123 are women and 51 men; 61 have a college or a higher education degree and 112 have achieved a master level. The average salary of teachers ranges from 360 to 420 Euros²⁷, depending on the level of education and the years of experience. An increase of 0,4% for each year of additional experience is foreseen, which means only 16% of increase in salary from the start of the career to the age of retirement. The impact of the crisis on the education in Serbia is visible in teachers' salaries. Two years ago, the average salary in education was 428 Euros, while now it is 339 Euros. This is the consequence of high inflation in the country (for this year, the official announced inflation rate is 10%). The amount in local currency is the same, as the salaries in education (as well as in other parts of public sector) are frozen. This was the request of IMF, as Serbia is under stand-by arrangement with this organization. The amount has hence remained the same in the last two years in local currency, but has decreased of 21% in Euros. Nobody declares any additional income connected to work or other income in money; as most of surveyed teachers live in rural areas, many of them have land and some income in kind.

Expenses

The average size of teacher family in 60% of cases is three and four family members, which is the average number of family members in the country. But 25% live in larger families with more than five members in the same household, including different generations. This is the characteristic of rural families, not urban. Besides parents, grandparents with pensions, dependent children, there are many unemployed active members of family. If they have some land, even if they do not declare any income from it, it is obvious that expenses for food are less for them than for those without land.

Most of rural teachers live in owned houses, and therefore commonly have no loan expenses in relation to their own housing – they often live in their parents' house. Only teachers in urban areas need to rent an apartment.

Living expenses are very different in the various regions – for example, in the North families need to be connected to gas pipes and have higher expenses, while in Southern regions households use woods or electricity, which are cheaper. Besides heating costs,

²⁷ This amount is net.

most of respondents report an overall increase in living expenses, especially for nutrition, telephone and credit rates. Those who go to work by car observe an augmentation of costs for transportation (not the same for people using public means of transportation, as public transport is paid by the local community). A very high percentage of teachers have bank credits with rates that amount up to a third of their salary and the amount has increased as a consequence of the augmentation of the value in Euros. Many people undertook their credits a few years ago, expecting an improvement in their income and quality of life, and are now in troubles paying credit rates.

There is a remarkable difference between North and South of the country in the indication of the amount of monthly income considered as necessary for decent life: for Northern regions, this amount is 2.000 Euros per family, for the South is 1.000 Euros. But, lot of them go to work by car (what is considered as luxury compared with income), as long as they can afford it, because they consider themselves as the middle class representatives, in spite of their real declining situation.

4.2.4. Working conditions of teachers

Working time

Working time of teachers is 40 hours a week, 20 of which are teaching hours. Additional teaching hours are paid before, but the latest explanation of regulations introduced this year declares that there should be no additional payment, in spite of the labour law regulation. So, if someone has additional hours, these shall not be paid. Administrative obligations are part of paid working hours, but many teachers consider these obligations as additional burden. Time for class preparation is also paid (half hour for one class), and it is usually done at home.

Teaching material

Teaching material is an issue. Teachers say they have plenty of material in schools - TV, video projectors, PCs, and so on - but most of this is in bad or hardly usable conditions (for example, PCs without internet connection).

Evaluation of students and teachers

Students undergo regular general testing in school at least twice a year, and additional evaluations prepared by teachers. Teachers' work is, on the contrary, not evaluated - some schools have self-evaluation methods and a few others undergo regular inspections.

Students' attendance and behaviour

Teachers do not report decreasing school attendance. The issue is more the diminishing number of children connected to a problem of general low birth rates throughout the country.

Many teachers report behavioural issues: mostly, aggressive behaviour, violence between children, students not respecting teachers. Many teachers link these attitudes to a poor level of upbringing by families.

4.2.5. Status of teachers

Contracts

Most of teachers participating to the survey are fully employed. For a small number the situation has changed in the last two years: they have less work hours, or only have short time contracts.

Training

Almost all teachers report that opportunities for in service training have remarkably diminished in the last couple of years. Local communities do not have enough funding, and, as a consequence, teachers can participate to training only if they can afford to pay it by themselves. For some teachers, the membership to professional associations is an opportunity to take part to seminars with lower prices. However, prices for seminars and training are in general quite high; meanwhile teachers have the obligation to attend a given amount of hours of training per year.

Job satisfaction and job-related psychological issues

In spite of the overall difficult situation, teacher satisfaction with their job is moderate or even high, but a number of them report that it is actually decreasing in these last years (mostly because of the low salary). Among reported psychological problems, teachers feel uncertainty connected with job insecurity, and generally feel over-burdened with tasks and obligations.

Future plans

Future professional plans depend on age. If older teachers are waiting for their retirement (even if they still need to work 5 years or more), some younger teachers are looking for alternative jobs, but the greatest majority of surveyed teachers do not have professional plans outside of education. Only few of them are enrolled in further training to obtain a higher degree of education.

When asked if they would choose the teaching profession again, and why they did choose it, most teachers confirm their choice, even despite the bad position of education in the society, the poor position of the profession and low status of teachers. Love towards children and love of the profession generally linger.

4.3. The Author's Perspective on National Results

The amount of teacher salaries in Serbia (about 340 Euros) is just a little bit more than the average salary in Serbia (33.955 dinars, i.e. about 320 Euros). With frozen salaries and high inflation rate, **it seems that employees in education** (and of the public sector as a whole) **are paying the price of the economic crisis**. Last summer, all employees in education received an amount of about 50 Euros as a help to survive, but it was something they considered as a charity, not as a reward for their work.

The last negotiations with IMF announced the permission to increase salaries in the public sector as from January, April and October 2011. It is, though, not clear of what amount, as the Government representative has given different figures; it is possible that salaries will be increased of 2% (half of the GDP increase plus the inflation rate of the last six month). In any case, salaries in the future should be harmonized with the real inflation rate. This will be an issue for further negotiations between unions and the Government, although Government representatives tend to avoid discussions about issues under the Collective Agreement with the excuse that there is no space for negotiation with unions after negotiations with the IMF. As a consequence of the crisis, the Law on the Budget for 2009 and 2010 decided to abolish jubilee awards and Christmas awards for employees in education, as well as other payments regulated in other Collective agreements, while these are nonetheless very important amounts for employees in education.

The second request of the IMF was to **cut the number of employees in the public sector by 10%**. The process is in the course in all areas of the public sector. In education, the government has adopted the regulation on the class size in primary and secondary education (plus gymnasiums and VET schools), defining the minimum and maximum of students for class. As the consequence of this regulation, many teachers remained without classes, which means without jobs. The action was led by Governmental officials in regional school administration with the participation of teachers unions to solve the problem of redundancy between schools in the region in order to 'rationalize' resources in education. In any case, the first results for this school year show that about 100 teachers have been left without classes, and more than 4200 have lost full employment (the number of part time jobs has increased, as well as the number of fixed term contracts). For example, all those schools that had introduced additional teachers for arts and other subjects had to go back to "one teacher classes" (for first 4 grades). As a result of the abovementioned processes, the quality of education is under threat in primary education.

Financing of education

The budget for education in 2010 remained what it was in 2009 in local currency, 103 billions of dinars (about 1 billion of Euros), which actually means a decrease of the GDP for education from 3.45% in 2009 to 3,35% in 2010. The level of **local administrations**

remains the big problem, as they lack funding capabilities to live up to their obligations. Some local communities found the money to pay jubilee awards or Christmas awards in spite of budget regulations, but most did not. For most of them even solving the basic maintenance of school buildings and pay other material costs for schools is nowadays a problem. The possible explanation is the cut of money transfers from the national level to local communities (in 2009 and 2010) due to the crisis. Some money is anyway transferred to the poorest communities mainly for social care.

The greatest concern for school masters is the number of students and classes compared to the number of employees and, consequently, how to solve the issue of full time job for teachers. Officials from local communities in charge for social sector (and education) confirm their commitment to the education in all aspects, but with different possibilities to finance all what school masters consider as important. Some officials have special funds to help students and teachers, but most of them consider these funds too poor to contribute to improvement to the quality of school institutions. Common projects with international organizations have good results, but they need permanent solutions for financing schools in local community, as these would need to be prepared for the future, i.e. there is need to re-establish school networks and change the system of financing education.

Education reforms in the course

Educational reforms started several years ago – in higher education in the framework of the Bologna process, in VET by introducing new professional profiles in pilot schools, in primary schools with new curricula, new standards for both students and teachers. One of the new obligations for elementary schools is the introduction of inclusive education in regular schools from the beginning of this school year. The Ministry of education has organized short training courses to prepare teachers for individual programmes of work with children with special needs and the network of support for teachers. But, many of teachers, confronted for the first time to such additional sensitive obligations, report to be under stress in front of this challenge, and to feel the lack of proper education and training.

The future key developments announced by the Ministry of Education concern the re-establishment of **school networks** at the beginning of next year and the introduction of the per capita financing of education. This later task will be postponed to the 2014/2015 school year and, up to that time, pilot programmes will be introduced to define the model and formula for changing the system of financing.

What is expected from teachers?

Teachers, without being consulted, are expected to undertake new tasks without proper preparation and training, to have additional obligations and burden with more students in class and to live up to more expectations from parents, officials and students, in

combination with low salaries and uncertainty of job and security. **They do not consider the global economic crisis as the cause of their bad position, but the crisis due to education reforms in country and the bad position of education in society for a longer period, as well as the terrible economic situation in the country in the long period.** On the other hand, in a society with very high unemployment rate (almost one million of unemployed) and with very high rate of the poverty (more than 700.000 people), being employed in education is a certainty that many people would like to have. For most of them, **education is a «secure house» in very insecure times.**

C. Conclusions and recommendations for further actions to react to the impact of crisis

Summary conclusions

The global economic crisis has certainly not improved an already critical situation, even if it cannot be blamed *per se* for being the only cause of the negative trends affecting national education systems in the surveyed countries. The crisis is generally worsening harmful effects linked to ongoing social and economic reforms of Central and Eastern Europe countries in the long period, and to the declining prestige of education in society for protracted time. Its impact, however, seems to be particularly relevant at local, rather than at national, level. If, in fact, at country level the crisis has accelerated processes of reform that were already ongoing, harshening in some cases their negative effects on the sector as a whole, **consequences at local level have proved exceptionally intense.**

On the one side, local financial resources have seen a drastic reduction in the last couple of years, as a result both of a (negative) trickledown effect of diminishing government's budgets and of a general drop of municipal/provincial revenues. As a consequence, **municipalities struggle to live up to their obligations to sustain schools and teachers** – teachers' incomes have been severely diminished due to the cut of most salary-related payments and extra-salary bonuses, normally funded locally, while resources allocated by local authorities for school maintenance and other non-salary related activities (such as training) have been decreased everywhere. On the other side, the lack of funding has caused or accelerated **processes of consolidation of school networks aimed at increasing the efficiency of public spending in education.** Small, remote schools with a very limited number of students (even less than 10, in some cases) have been shut down, and students have been channelled into bigger schools with multi-grade education classes. Needless to say, bigger classes (with increasing student-teacher ratios), multi-grade teaching, lack of appropriate teaching material and, often, inadequate preparation of teachers have very negative effects on education quality. Access to continuous professional development has also been curtailed down as it depends on teachers' ability to pay for it.

Furthermore, rural areas and small towns in surveyed countries are often economically and socially depressed compared to cities and have already been facing a resource crisis for many years. The further worsening of their financial situation frequently impacts the already critical situation of economically disadvantaged groups – children coming from disadvantaged families, from minorities, and Roma people, in particular. Foreign language teachers as well as support staff have been frequently dismissed, while after-school activities have been reduced if not slated down at all. The study presents an important finding about the particularly **alarming situation of schools with high shares**

of disadvantaged pupils, mostly pupils from socially disadvantaged background or minorities: teachers report, in fact, worsening trends in attendance and in school results.

As **teachers are rarely involved in reform proposals and decision-making processes**, they appear to be squeezed between low salaries and uncertainty of job and security, on the one side, and, on the other side, demands to realize new tasks, to have additional obligations and burden with more students in class and to live up to more expectations from parents, officials and students, all without proper preparation and training. In addition, we also have to consider the side effects of the economic crisis on education, such as the increasing unemployment and poverty affecting the environment at home, the time parents spend supporting/helping their children, a weakening investment by parents in their children education, high inflation rates affecting the purchasing power of households, and so on, and the fact that diminished salaries for teachers mean less enthusiasm and less opportunities for professional development and for extracurricular activities.

However, another alarming finding of the study is that teachers, at least in the surveyed areas, have very limited knowledge and awareness of the overall situation in their countries and of the political factors affecting policy decisions at regional, national and international levels. Respondents, in general, tend not to link the current global economic crisis to governments' policies in education. Even if it is true that employees in education (and in the public sector as a whole) are paying a considerable economic, social and psychological price in relation to the crisis, nonetheless work in education is still perceived as a 'secure house' in very insecure times. Belonging to the profession and commitment to education remains strong, even in spite of the objective situation.

With declining local income and budget allocations from central governments (for teacher salaries and other costs), local governments are pushed into very difficult compromises on the access to education, on its quality, or both of them. This is likely to increase inequalities across regions. In addition, when combined with effects of new funding strategies based on the principle 'money-follows-student', schools may find themselves in direct competition for students and public money in the same municipality or with schools in other localities. Policy trends of decentralization lead to an increasing role of municipalities/local authorities in planning and maintaining education provisions, thus giving opportunity to address these issues directly with well-targeted interventions – know-how, training, tutoring on how to re-organize existing resources to keep and develop education services. If schools are established and maintained by local governments, technically it is their decision to close them down or reorganize, depending of course from the overall economic situation in these localities. In the emerging system of decentralized policies of education provision, two trends are possible. Some local governments may try to develop larger and competitive schools to attract students from

broader catchments' areas, in order to receive more funding *per capita*. Some municipalities may instead seek by any means to maintain small rural schools, in order to receive at least some money and to preserve survival of marginal communities. In any of these cases, however, the quality of education may be seriously compromised. Together, in fact, the abovementioned trends may likely lead to the creation of a segregated school system, with large, competitive 'magnet schools' in richer areas and left-alone, small schools in remote or disadvantaged areas, struggling to get the necessary resources. The ultimate results of this process may be the diminishing quality of education in certain local schools and, hence, the deterioration of equity in access to 'good' education at national level.

Recommendations

The EI High Level Seminar on the *Impact of the economic crisis on education in Central and Eastern Europe*, held in Warsaw in September 2009, concluded that "in the context of financial and economic crises, governmental intervention characteristically has the nature of response to a situation of 'force majeure', as policy-makers and economists desperately reach out for solutions. However, [...], there is always a space for manoeuvre in which unions can work to exert their influence" (EI, 2009a). If we take a closer look to such space of manoeuvre, we can identify specific recommendations to a set of key issues that have emerged in relation to the crisis and in the framework of this study, too:

- Balancing Public Budgets: as we have seen, immediately after the crisis, government responses have been focused on rapid interventions in monetary and fiscal policy. However, in the medium and long-term, government policy have to be developed to provide a strategy for long-term economic growth in order to avoid next years' budget unbalances and, particularly, effects on teachers' salaries, as these constitute a big share of education budgets;
- Making Education Part of the Recovery and Growth Strategy: investment in education is not only good for economic recovery, but also for economic growth in the long term. This means defending education investments in the context of increases in other governmental costs (e.g. for social security), or directing fiscal stimulus resources to the education sector, and in some cases specifically at local level;
- Maintaining or increasing teacher salaries: discussions on teachers' salaries need to be seen in a context that takes into account wider issues affecting teachers, such as teachers' motivation, expectations and respect, or the working environment, school leadership, possibilities for professional development, and so on. Imbalances between different regions in a country, between men and women, between mainstream and minority groups, or between contract teachers and teachers with tenure are other factors. Unions can play a critical role in bringing a social

dimension to discussions on salary and career progressions. Moreover, speaking in purely economic terms, by investing in secure jobs in the education sector, governments can stimulate consumption, i.e. in turn, such a fiscal stimulus will give a boost to the economy (the US has recently been an example);

- Making teaching more attractive: the teaching profession needs to be made more attractive in order to maintain and increase capacity and quality in education. Part of this attractiveness depends on the salary levels available to teachers, as their levels of remuneration should be (favourably) comparable to those received by professionals in other sectors having similar qualifications. This can be particularly relevant for remote and disadvantaged areas where it can be remarkably difficult to attract (quality) teachers, with negative consequences on education equity at country level;
- Enrolment in Education: the rise of unemployment at national level may lead to a situation where the 'hidden' costs of education (i.e. school fees or the opportunity cost of having children not generate 'income') cannot be sustained by families anymore, or where children are forced to work – and this concerns, above all, children coming from a disadvantaged socio-economic background. Thus, maintaining unemployment benefits and activist labour market policies are of key relevance;
- The Right to Education: education unions should continuously reaffirm the fundamental responsibility of governments to ensure the right to education of all children, and, especially, in the framework of this study, as far as disadvantaged groups (including minorities, immigrant communities and people with disabilities) are concerned;
- Addressing demographic trends and rural/urban inequalities: small rural schools should not be simply closed on the formal grounds of missing student number targets and efficiency arguments. Whenever possible schools should be maintained as close to communities as possible, even with increased per-capita funding. When schools are reorganized in clusters, teachers' professionalism should not be undermined at any cost.
- Awareness raising among education sector employees, teachers, principals and parents: professionals working in education as well as local communities must acquire broader perspective of the ongoing policy trends in order to become proactive in defence of quality education for all.

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Annex I – Statistical data on Slovakia**Table 1: Macroeconomic data and local schools funding during 2007-2009 (billion EUR or %)**

	GDP (billion EUR, nominal prices)	Inflation (HICP, YoY)	General government expenditure (billion EUR)	Total disposable funds for local schools (billion EUR)	YoY change in %	Total funds from the state budget (incl. unspent funds transferred from the previous year budget) (billion EUR)	YoY change in %	Other than state budget sources (contributions from municipalities, parental fees, profit, rent revenues, gifts and grants, etc.) (billion EUR)
2009	63,3	0,9%	-	1,333	7,3%	1,260	8,3%	0,073
2008	64,7	3,9%	22,542	1,242	6,7%	1,163	1,0%	0,079
2007	54,9	1,9%	18,871	1,164		1,151		0,012

Source: Statistical Office of Slovak Republic (GDP), Eurostat (HICP, general government expenditure), Ministry of Education Reports on School Financing 2007 - 2009, <http://www.minedu.sk/index.php?lang=sk&rootId=834>

Table 2: Municipal revenues and expenditures (in billions EUR)

	2008	2009	2010
Municipalities - revenues total	3,606	3,758	3,700
Municipalities - expenditures total	3,343	3,543	3,642
in that: education expenditures	1,050	1,249	1,143 ^x
Self-governing regions - revenues total	1,195	1,179	1,183
Self-governing regions - expenditures total	1,122	1,135	1,174
in that: education expenditures	0,464	0,511	0,505 ^x

x – actual data not available yet, instead of them budgeted expenditure is presented

Source: Ministry of Finance Draft Public Administration Budget for Period 2011-2013, Annex 1, <http://www.finance.gov.sk/Default.aspx?CatID=7716>

Table 3: Average nominal monthly wages in the Slovak economy and education sector (EUR)

	2005	2006	2007	2008	2009
Overall economy	573,39	622,75	668,72	723,03	744,50
Education sector	468,73	512,41	551,95	599,42	643,18
Employees in local schools		569,2	612,7	661,1	711,2
Teachers in local schools		630,65	676,76	729,3	782,8

Source: Statistical Office of the Slovak Republic, <http://www.statistics.sk> (overall economy, education sector), Reports on School Financing 2007 - 2009, <http://www.minedu.sk/index.php?lang=sk&rootId=834>

Table 4: Number of school founders, local schools, pupils, employees and teachers at local schools during 2006/07 – 2009/10

	number of school founders	number of local schools	% change	number of pupils in local schools	% change	employees in local schools	% change	in that: teachers	% change	pupil-teacher ratio for primary and secondary education combined
2009/10	1801	3239	-0,6%	785570	-2,8%	81 142	-0,4%	62 306	-0,6%	12,61
2008/09	1806	3259	-11,6%	807585	-6,3%	81 492	-2,0%	62 680	-2,0%	12,88
2007/08	1821	3638	3,2%	858166	-3,4%	83 155	-2,0%	63 943	-1,9%	13,42
2006/07	2006	3521		887221		84 840		65 178		13,61

Source: Ministry of Education Reports on School Financing 2007 - 2009, <http://www.minedu.sk/index.php?lang=sk&rootId=834>

Annex II - Data on education and on the surveyed sample - Romania**Table 1. Structure of the education system**

Level of education	Grade	Age group
Pre-primary education		3-4
		4-5
		5-6
Primary education	1	6-7
	2	7-8
	3	8-9
	4	9-10
First phase lower secondary education	5	10-11
	6	11-12
	7	12-13
	8	13-14
Second phase of lower secondary education/ vocational education	9	14-15
	10	15-16
Upper secondary education	11	16-17
	12	17-18

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n**Table 2. Pupil/teacher ratio**

Year	2002/2003	2006/2007	% variation (2002/2006)	2008/2009
α. Pupil/teacher ratio primary	17	17	0	16
β. Pupil/teacher ratio lower secondary	12	11	- 8,33	11
χ. Pupil/teacher ratio upper secondary	15	16	+ 6,66	15

Research methodology

The research has been conducted in 15 schools selected either from rural or periurban areas of South, South West and Central part of Romania, inhabited by economical disadvantaged population and/ or ethnic minorities. The most significant ethnic minorities represented in these areas are Roma, Hungarians and Serbians.

List of selected schools

No.	School	Address	Type	Number of students	Level	Pupils belonging to minority groups ²⁸ (%)
1	School 161	Calea Giulesti 486A, Bucharest, 6	Periurban	165	Preschool Primary Lower Secondary	30 Roma
2	School 153	Drumul Sabarani 21, Bucharest, 6	Periurban	348	Preschool Primary Lower Secondary	90 Roma
3	School "Tatrangi Sandor"	Ozun, Covasna County	Rural	378	Preschool Primary Lower Secondary	90 Hungarians ²⁹
4	School "Comenius"	Bretcu, Covasna County	Rural	235	Preschool Primary Lower Secondary	74 Hungarians ³⁰
5	School "Gaal Mozes"	Kossuth Lajos 172, Baraolt, Covasna County	Periurban	565	Preschool Primary Lower Secondary	95 Hungarians
6	School Comandau	Scolii 4, Comandau, Covasna County	Rural	87	Preschool Primary Lower Secondary	99 Hungarians
7	School "Frumuseni"	Frumuseni, Calarasi County	Rural	290	Preschool Primary Lower Secondary	48 Roma
8	School "Curcani"	Curcani, Calarasi County	Rural	682	Primary Lower Secondary	60 Roma
9	School "Chirnogi"	Chirnogi, Calarasi County	Rural	385	Preschool Primary Lower Secondary	55 Roma
10	School "Stancea"	Stancea, Calarasi County	Rural	251	Preschool Primary Lower Secondary	70 Roma
11	School 181	Nazarcea Street, No. 20, Bucharest, 1	Periurban	400	Preschool Primary Lower Secondary	15 Roma
12	School "Belobresca"	Belobresca, Caras Severin County	Rural	131	Preschool Primary Lower Secondary	100 Serbian
13	School "Sintesti"	Sintesti, Ilfov County	Rural	222	Primary Lower Secondary	67 Roma
14	School "Sindrilita"	Sindrilita, Ilfov County	Rural	144	Primary Lower Secondary	100 Roma
15	School "Crestesti"	Crestesti, Ilfov County	Rural	114	Primary Lower Secondary	10 Roma

²⁸ The percentages are estimated by the school Principals, not part of official statistics.

²⁹ Out of which 5% are Roma children identifying themselves as Hungarians.

³⁰ Out of which 29% are Roma children identifying themselves as Hungarians.

Information related to respondents' identity

Age: The age of the vast majority of the respondents spreads between 20 and 40 years.

Sex: The group of respondents includes:

- 31 male teachers (23,66%)
- 131 female teachers (76,34%)

Position in the system: The group of respondents includes:

- 15 school Principals
- 6 representatives of the local authorities
- 139 teachers from preschool, primary and lower secondary education

Professional background: The majority of teachers (51,65%) graduated long term programme studies at the university level.

Teaching experience: The respondents group is dominated by teachers having between 11 and 20 years of experience (41,25%), followed by young teachers (27,50%).

Size of the school: The average number of students in the selected schools is 315,5, with a minimum in Comandau (87 students) and a maximum in Curcani (682 students).

School location: The schools repartition by location is the following:

- 10 schools - 66,66% - rural area
- 5 schools - 33,33% - periurban area.

Members of Trade unions: Most part of the teachers are members of a trade union (85,48%). According to the law, school principals cannot be members of a trade union.