



European
Commission

Education and Training Monitor 2019

Hungary



EUROPEAN COMMISSION

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Volume 2 of the Education and Training Monitor 2019 includes twenty-eight individual country reports. It builds on the most up-to-date quantitative and qualitative evidence to present and assess the main recent and ongoing policy measures in each EU Member State. It therefore complements other sources of information which offer descriptions of national education and training systems.

Section 1 presents a statistical overview of the main education and training indicators. Section 2 briefly identifies the main strengths and challenges of the country's education and training system. Section 3 focuses on teachers and challenges of teaching profession. Section 4 looks at investment in education and training. Section 5 deals with policies to modernise early childhood and school education. Section 6 discusses measures to modernise higher education. Finally, section 7 covers vocational education and training, while section 8 covers adult learning.

The Education and Training Monitor 2019 was prepared by the Directorate-General for Education, Youth, Sport and Culture (DG EAC), with contributions from the Directorate-General of Employment, Social Affairs and Inclusion (DG EMPL) and the Eurydice Network. DG EAC was assisted by the Education and Youth Policy Analysis Unit from the Education, Audiovisual and Culture Executive Agency (EACEA), Eurostat, Cedefop and the JRC's Human Capital and Employment Unit, Directorate Innovation and Growth. The Members of the Standing Group on Indicators and Benchmarks (SGIB) were consulted during the drafting phase.

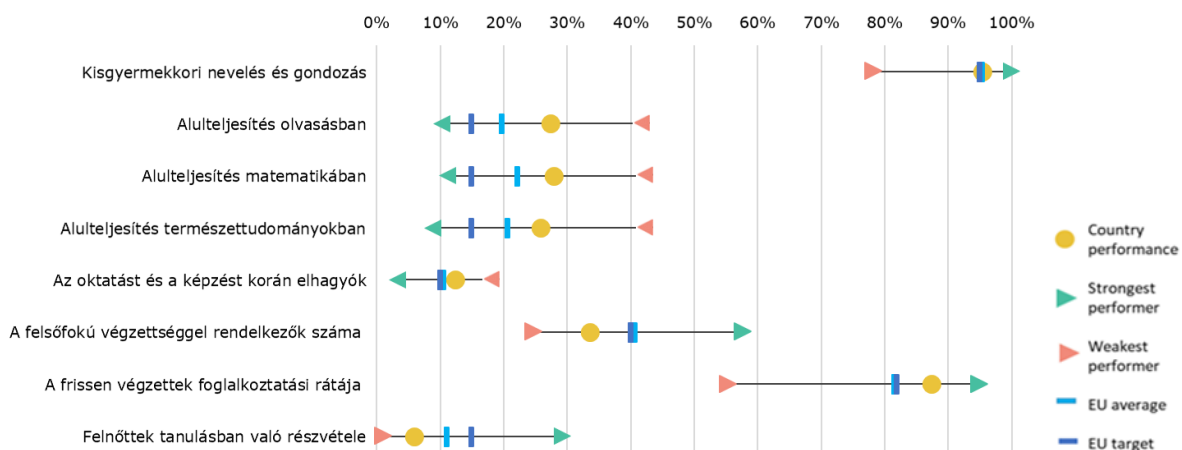
*The manuscript was completed on 26 August 2019.
Additional contextual data can be found online (ec.europa.eu/education/monitor)*

1. Key indicators

		Hungary		EU average		
		2009	2018	2009	2018	
Education and training 2020 benchmarks						
Early leavers from education and training (age 18-24)		11.5%	12.5%	14.2%	10.6%	
Tertiary educational attainment (age 30-34)		24.0%	33.7%	32.3%	40.7%	
Early childhood education and care (from age 4 to starting age of compulsory primary education)		94.8%	95.6% ¹⁷	90.8%	95.4% ^{17,d}	
Proportion of 15 year-olds underachieving in:	Reading	17.6%	27.5% ¹⁵	19.5% ^{EU27}	19.7% ¹⁵	
	Maths	22.3%	28.0% ¹⁵	22.3% ^{EU27}	22.2% ¹⁵	
	Science	14.1%	26.0% ¹⁵	17.7% ^{EU27}	20.6% ¹⁵	
Employment rate of recent graduates by educational attainment (age 20-34 having left education 1-3 years before reference year)	ISCED 3-8 (total)	75.5%	87.5%	78.3%	81.6%	
Adult participation in learning (age 25-64)	ISCED 0-8 (total)	3.0%	6.0%	9.5%	11.1%	
Learning mobility	Degree-mobile graduates (ISCED 5-8)	:	4.1% ¹⁷	:	3.6% ¹⁷	
	Credit-mobile graduates (ISCED 5-8)	:	3.8% ¹⁷	:	8.0% ¹⁷	
Other contextual indicators						
Public expenditure on education as a percentage of GDP		5.4%	5.1% ¹⁷	5.2%	4.6% ¹⁷	
Education investment	Expenditure on public and private institutions per student in € PPS	ISCED 0	: ¹² €5 140 ¹⁶	:	€6 111 ^{15,d}	
		ISCED 1	€3 362 ¹²	€3 899 ¹⁶	€5 812 ^{12,d}	€6 248 ^{15,d}
		ISCED 2	€3 431 ¹²	€4 108 ¹⁶	€6 937 ^{12,d}	€7 243 ^{15,d}
		ISCED 3-4	€3 316 ¹²	€6 135 ¹⁶	:	€7 730 ^{14,d}
		ISCED 5-8	€6 830 ¹²	€7 231 ¹⁶	€10 549 ^{12,d}	€11 413 ^{15,d}
Early leavers from education and training (age 18-24)	Native-born	11.4%	12.6%	13.1%	9.5%	
	Foreign-born	: ^u	: ^u	26.1%	20.2%	
Tertiary educational attainment (age 30-34)	Native-born	23.6%	33.4%	33.1%	41.3%	
	Foreign-born	41.3%	44.9%	27.7%	37.8%	
Employment rate of recent graduates by educational attainment (age 20-34 having left education 1-3 years before reference year)	ISCED 3-4	66.4%	84.0%	72.5%	76.8%	
	ISCED 5-8	84.8%	91.5%	83.8%	85.5%	

Sources: Eurostat; OECD (PISA); Learning mobility figures are calculated by the European Commission's Joint Research Centre (JRC) from UOE data. Further information can be found in Annex I and in Volume 1 (ec.europa.eu/education/monitor). Notes: EU averages of 2009 PISA do not cover Cyprus; d = definition differs, := not available, u = low reliability, 12= 2012, 14=2014, 15 = 2015, 16=2016, 17 = 2017.

Figure 1 Position in relation to strongest and weakest performers



Source: European Commission, Directorate-General for Education, Youth, Culture and Sport (DG EAC) calculations, based on data from Eurostat (LFS 2018, UOE 2017) and OECD (PISA 2015).

2. Highlights

- Recent measures have raised the qualification levels of staff in early childhood education and care.
- Measures to reduce performance gaps between pupils have been strengthened.
- Admission conditions for entry to higher education have been made more restrictive.
- A new medium-term strategy aims to modernise vocational education and training and adult education.

3. A focus on teachers

Alongside increased participation in early childhood education and care (ECEC), staff qualification levels have been raised. The 2013 teacher career model and progression path was extended to ECEC staff, who are now required to hold a tertiary degree (similar to other teachers) in pre-school education. This attracted a big increase in applicants: student enrolments grew by more than 50% from 2013 to 2014. In 2016, their qualification requirements were further updated to include competencies in children's rights, teaching through arts, inclusion, and support to disadvantaged children. The increase in graduate numbers, however, has not led to a significant increase in the number of professionals working in ECEC since many of them were working already at the time of starting their studies. Wages for pre-school teachers remain low, especially for entrants, who earn 195 000 HUF/month (EUR 606). 16% of recent graduates do not work in the profession (OH, 2018d).

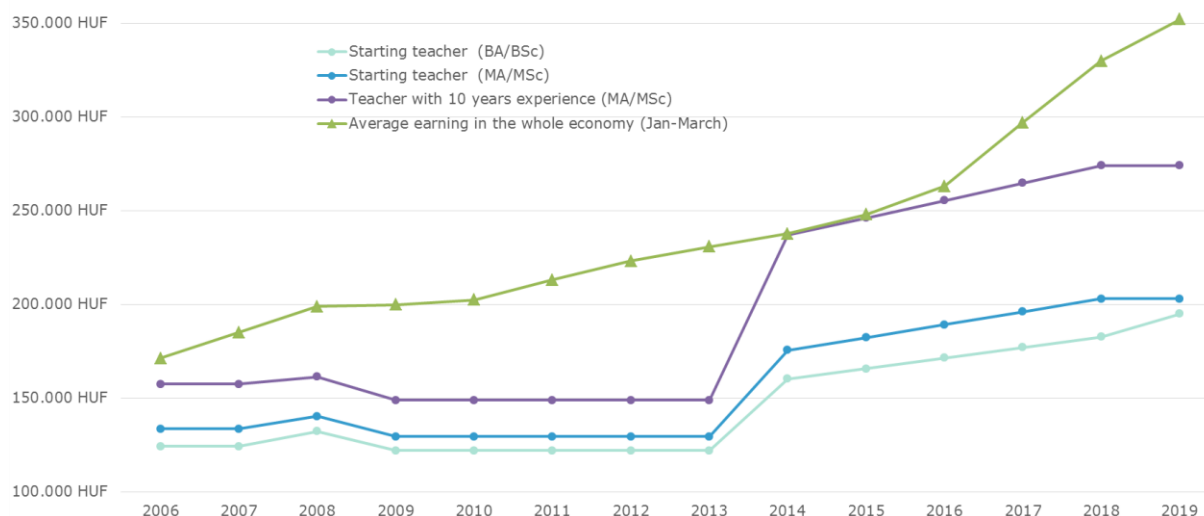
Teachers' job satisfaction is somewhat below the EU average. According to the 2018 OECD Teaching and Learning International Survey (TALIS), the proportion of teachers satisfied with their job is slightly below the EU average (88.1% v 89.5%). 72.0% say that if they could decide again, they would still choose to become a teacher (EU average: 77.6%); among teachers with more than 5 years' experience this drops to 71.3% (EU average: 76.4%). The proportion of teachers who feel well or very well prepared in using information and communications technology (ICT) is much higher than the EU average (65.7% v 39.4%). However, 20.5% report the need for professional development in ICT skills (EU average: 16.1%). Continuous professional development is obligatory for promotion. 94.5% of lower secondary teachers participated in 2018, which corresponds to the OECD average.

There is an increasing shortage of teachers, especially in poorer regions and for specific subjects. The teacher workforce is ageing: in 2017 the proportion of teachers aged over 50 was at 41% while the share under 30 made out only 6%¹. The number of applicants for initial teacher training has increased in recent years, but dropout rates are high and fewer than half of graduates actually enter the profession². The shortage is currently worst in poorer, disadvantaged areas; for science subjects and foreign languages; and in vocational education and training. Low salaries are one factor (Figure 2). The statutory salary of a starting teacher in purchasing power standards is one of the lowest in the EU (Eurydice, 2018). The National Chamber of Teachers (NPK, 2019) has called for a more dynamically rising salary scale in the first 10 years of career, and for restoring the ratio between the starting salary and the minimum wage to where it was in 2013. One measure to help retain graduates in the profession is the 'Klebelsberg stipendium'. Students in initial teacher training and special education are entitled to the stipendium on condition that they work for a time at a state school after graduation. In addition, a grant scheme was set up in 2017 to contribute to students' living costs during their teaching practice year.

¹ Source: Eurostat [educ_uoe_perp01]

² Source: KIR-STAT database.

Figure 2 The evolution of earnings of teachers and in the whole economy (2006-2019)



Source: Central Statistical Office; 2011 Act CXC on National School Education; Acts on the Central Budget (2006-2019)

Recent legislative changes re-established some previous competences of school principals. Legislative changes in 2011 restricted schools' autonomy on teaching content, textbook choice and management of financial and human resources. The duties of employer and financial management were transferred from school principals to the state. These restrictions do not apply to non-state schools, which thus can offer more attractive conditions to both teachers and pupils. Some principals' powers were restored in 2017: decisions on appointments and dismissals of teachers are taken together with the school district leader. Principals can also manage a certain part of the budget for everyday expenses. The responsibility for school maintenance previously held by municipalities was taken over by the state in 2017, ending their role in the financing, maintenance and management of schools.

4. Investing in education and training

General government expenditure on education as a proportion of GDP was 5.1% in 2017, above the EU average of 4.6%. Compared to 2001, real (inflation-adjusted) expenditure³ on education increased by 11.5% during the recession (2007-2009) and by 23.5% in 2014-2016. The 2016-2017 spending rise in real terms (4.5%) went mainly to higher education, while spending on secondary and post-secondary non-tertiary education dropped by 2.4%.

The number of schools has not been aligned to the reduced school population, with risks for public spending efficiency. The year-on-year decrease in the school population was 0.8% in 2017/2018 (KSH, 2018); the decline between 1990 and 2016 was 10 times greater than the decrease in the number of primary schools. This reduces efficiency: the proportion of unused school capacity increased sharply to 7% in the elite type 6- and 8-year secondary schools, 26% in traditional grammar schools (*gimnázium*), 46% in vocational grammar schools (*szakgimnázium*) and as high as 64% in vocational training schools (*szakközépiskola*) (OH, 2018a). The pupil-teacher ratio was at 11 to 1 in primary education in 2016, against an OECD average of 15 (OECD, 2018). Maintaining the large number of schools has in effect increased parental choice and the scope for segregating students by socio-economic status (Radó, 2018).

Differences in the regulatory framework for schools based on their status are impacting on equity. In 2001-2016, the proportion of church schools increased from 5% to 15.8% in basic education and from 10.4% to 22.8% in upper-secondary education (MTA, 2018). Church schools are exempt from some legislative restrictions and in particular do not participate in system-level desegregation measures, thereby limiting the measures' impact. There is a growing concentration of disadvantaged and Roma pupils in certain schools: the proportion of basic schools with a Roma population of 50% or higher increased from 10% in 2008 to 15% in 2017, partly reflecting the

³ Expressed at constant 2010 prices by using the implicit deflator for final consumption expenditure of the general government.

demography of the locality in which the school is located. Pupils' family background, as measured by the composite indicator used in the national competence test, is significantly more favourable in church schools than in state schools⁴. An amendment to the National School Education Act⁵ adopted in July 2019 has removed the right of teaching staff, pupils, parents or national minorities to express an opinion on school head appointments at state schools. In its 2019 country-specific recommendation, the Council of the EU recommended that Hungary take measures to improve education outcomes and increase the participation of disadvantaged groups, in particular Roma, in quality mainstream education (Council of the European Union, 2019).

5. Modernising early childhood and school education

Measures to improve access to and the quality of early childhood education and care (ECEC) will help reduce inequalities in educational outcomes. 95.6% of children aged 4-6 participate in ECEC, around the EU average. In 2016 Roma participation was 91%, close to the national average and by far the highest among Member States in the region (FRA, 2016). As performance gaps appear at early ages, lowering the age of compulsory participation in kindergarten from age 5 to 3 from 2015/2016 has been a positive step that is likely to improve children's later performance at school. To ensure participation, the family allowance was made conditional on kindergarten attendance. In 2017, 13.8% of children under 3 attended ECEC (EU average: 34.2%)⁶.

Box 1: A springboard for disadvantaged children: the Sure Start programme

The Sure Start Children's Houses (SSCH) programme ensures access to early development and day care for children below 3 in disadvantaged regions, especially in poor villages with a Roma population. Begun in 2006, its main aim is to prepare disadvantaged young children for kindergarten through physical, mental, social and emotional development.

The programme is based on strong cooperation with parents and partners from health, social and early childhood care services. Parents are involved in children's activities, which helps to develop their parenting skills. One of the most recognised added values of the programme is the involvement of Roma in different services (NESET, 2018). Participation empowers Roma parents, allowing them to widen their social network and develop relationships with other parents, institutions and services.

In 2013, the Sure Start programme was integrated into the Child Protection Law as a basic component of child welfare services. Since EU funding ended in 2014, the programme has been funded from the national budget. Currently there are some 135 SSCHs funded across the country and the government plans to increase this to 240 in 2019. A recent evaluation of the programme recommends further developing quality assurance, making the involvement of Roma workers compulsory, and financing the further training of staff as well as the participation of teachers, speech therapists and child psychologists (T-TUDOK, 2018).

The early school leaving rate (ESL) remains high, especially in disadvantaged regions and for vocational training. In 2018, ESL remained at 12.5%, having seen an increase in recent years which goes against the decreasing EU average (now at 10.6%). The rate is particularly high among Roma (65.3%). Participation of 17 and 18 year-olds in secondary education dropped sharply between 2011 and 2016 (from 98% to 85%) after the age of compulsory education was lowered from 18 to 16 in 2012. The distribution of pupils affected varies greatly by school type and region (OH, 2018b). In the three most affected counties⁷, more than 15% of pupils are at risk of dropping out. In vocational training, this figure is 19%. ESL correlates strongly with local education outcomes, which are lowest in rural settlements (OH, 2018c). In rural communities the capacity to provide quality education services is more limited and teacher shortages are more pressing. Hungary has the largest urban/rural gap in education outcomes, before accounting for socio-economic status, of all OECD countries (OECD, 2019b) (Figure 3).

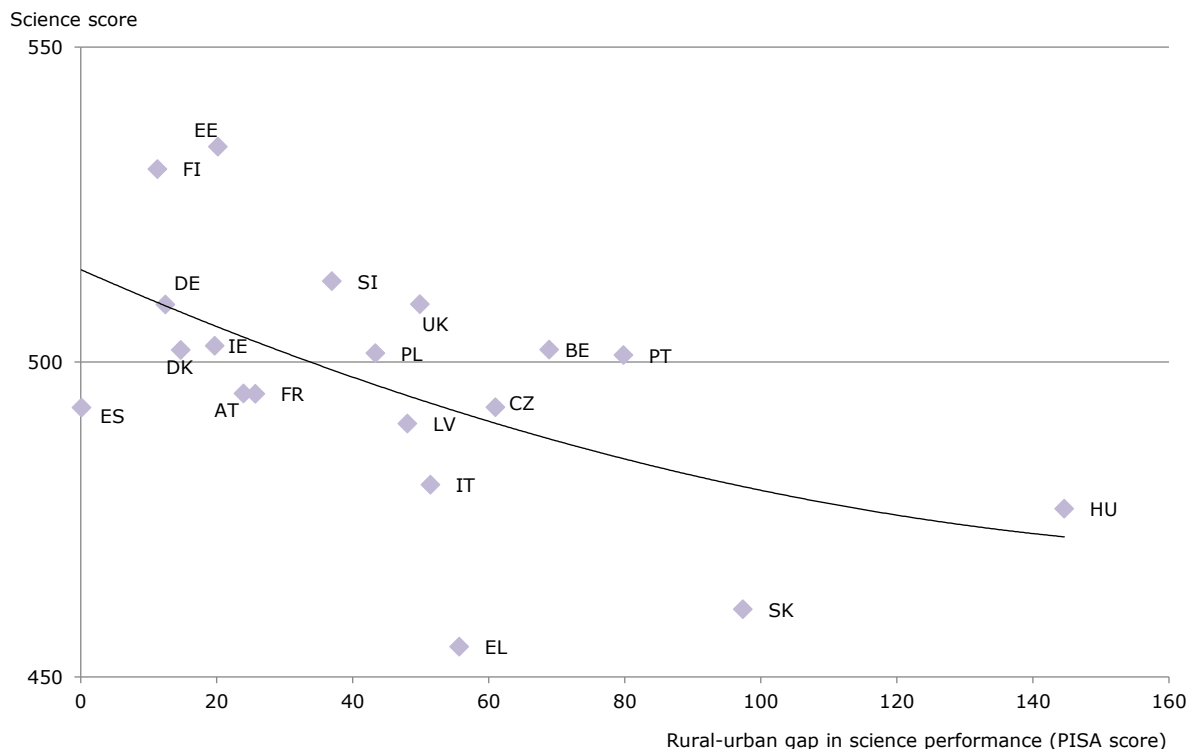
⁴ The 0 value of the index is the average family background status of all pupils tested. In 2017 the average value was minus 0.05 in public schools and 0.18 in church schools in grade 6. Calculations by Kriszta Ercse.

⁵ Act LXX of 2019 on National Public Education

⁶ Source: EU-SILC [ilc_caindformal]

⁷ Borsod-Abaúj-Zemplén, Nógrád and Szabolcs-Szatmár-Bereg

Figure 3 The urban-rural gap and average science performance



Source: OECD PISA 2015

The ‘tanoda’ after-school programme has been strengthened to reduce inequalities.

‘Tanoda’s are after-school child-welfare services offered to disadvantaged pupils, in particular Roma, as one of the measures to reduce education gaps. Other measures in the package include: free school meals for disadvantaged pupils; free Sure Start childcare services in disadvantaged regions; and the extension of compulsory participation in ECEC. Tanoda supports pupils’ school performance and development through personalised support and non-formal and informal ways of learning. The first after-school houses were created in the 1990s as civil initiatives and were financed from the European Social Fund from 2004 onwards. As of 2019 tanoda has been integrated into the Child Protection Law⁸ as a basic child welfare service, supported by a national grant system of HUF 2.5 billion (EUR 7.82 million). This allows the financing of around 200 after-school houses for around 15 000 disadvantaged pupils annually. To ensure quality, only organisations that provided tanoda services in the previous year were eligible to apply and all organisations working as tanoda need to acquire accreditation by June 2019.

The number of foreign languages learned in secondary school is below the EU average. In secondary education 49% of pupils learn two or more foreign languages (EU average: 59%). To improve pupils’ foreign language skills, in February 2019 the government announced the launch of a grant scheme supporting two-week summer language courses abroad for 9th and 11th graders. Around 140 000 pupils a year are expected to benefit from the scheme with a budget of HUF 90 billion a year (around EUR 280 million), a substantial sum equivalent to 12% of total expenditure on secondary education in 2017. However, the expected impact of the language trips is likely to be limited given the increasing shortages of qualified language teachers.

The choice of textbooks is limited by the decision to create a monopoly for their publication and distribution. In 2013, the right to distribute textbooks was given to the single distributor KELLO (Könyvtárellátó Nonprofit Kft.), which barred private distributors from the market. In March 2019 the European Court of Human Rights (ECHR, 2019) ruled that by ‘monopolising’ the textbook distribution market, the state had violated companies’ property rights. Schools may only use their textbook budget for orders from a list of licenced textbooks. Most

⁸ 40/2018. (XII. 4.) ministerial decree

textbooks from independent publishers are expected to disappear by 2019/2020 because their licences were not extended in 2019 by the Educational Authority.

6. Modernising higher education

Tighter conditions for admission to higher education are likely to restrain tertiary attainment rates. The employment rate of recent tertiary graduates in 2018 was 91.5%, well above the EU average of 85.5%, reflecting strong demand for highly skilled workers. Tertiary graduates also enjoy the highest wage premium in the EU (OECD, 2017). However, against the background of demographic decline and outward migration trends⁹, current enrolment and completion trends make it harder to respond to this high demand: the tertiary educational attainment rate among 30-34 year-olds stood at 33.7% in 2018, well below the EU average (40.7%). Enrolment numbers dropped by 18% in 2012 when the government announced it was reducing state-financed student places and introducing study contracts. From 2020, a foreign language certificate of proficiency level B2 and an advanced level matura exam will be required to enter all but short-cycle tertiary programmes. This may further reduce the already shrinking pool of applicants, as only 48% of applicants currently hold a B2-level language certificate (MTA, 2018), while the secondary school curriculum targets only B1 level. The Ombudsman found that the proposed language requirement would need to be accompanied by a greater allocation of human and other resources to language teaching to avoid infringing constitutional rights (Ombudsman, 2017).

Student scholarships are being increased in two steps. From February 2019 the per capita financing of higher education institutions has increased from HUF 119 000 (~EUR 380) to HUF 128 520, and in 2020 it will reach HUF 166 600 (~EUR 533). This money is distributed among students in the form of the social grant, basic student support and study scholarship. In 2018/2019, 78% of newly admitted students received a state-financed place; the remaining 22% self-financed their studies. Among students receiving state financing, a maximum of 50% may be entitled to a study scholarship.

A new financing model is expected to bring more flexibility to the operation of higher education institutions. In autumn 2018, the government transferred supervision and maintaining rights over Corvinus University of Budapest from the Ministry of Human Capacities to the Ministry of Innovation and Technology. In mid-2019, a public foundation named Maecenas Universitatis Corvini was established which holds all the estates of the university, to which the state has allocated extensive assets whose dividends can be used to run the university. The university thereby becomes exempt from the scope of the Budget Law which covers all public institutions. This should give it more flexibility and autonomy in its operation and enable more efficient cooperation with the business sector for innovation. The aim is to introduce more efficient operating models across higher education.

Recent legislative changes are seen as limiting academic freedom. A 2017 legislative amendment stipulates that any foreign institution outside the European Economic Area that grants degrees in Hungary must operate in its country of origin and be governed by a bilateral agreement between the two states. Following lengthy discussions with the authorities, the Central European University, specifically concerned by the amendment, decided to move its U.S. degree programmes to Vienna from September 2019.

⁹ Hungary is the only country in the EU where the graduate migration rate is higher than the rate in less-qualified groups (Hárs, 2019).

Box 2: The Graduate Tracking System (Diplomás pályakövetési rendszer, DPR)

European Social Fund (ESF) project: TÁMOP-4.1.3 Systemic development of higher education services

Duration: March 2012–February 2015

Budget: HUF 1.57 billion

Implementing body: Educatio Ltd. in consortium with the Educational Authority

DPR's aim is to inform applicants to degree programmes about career prospects and make it easier to adapt degree programmes to the jobs market.

The system combines data from surveys on graduates' careers and from different administrative registers. The methodology and central elements of the survey module were developed within the ESF project. In addition, several higher education institutions were given funding to develop their own tracking systems, based on a standardised methodology.

Surveys are carried out on graduates' careers 1, 3 and 5 years after graduation. The administrative data integration module links together the Higher Education Information System and the Student Loan Centre with other public registers, such as those for tax, social security health and labour. Research data will be accessible in an open searchable online interface from October 2019.

7. Modernising vocational education and training

A medium-term strategy was adopted in March 2019 to reform VET from 2020-2021. The 'Vocational Education and Training 4.0' strategy aims to make VET more attractive and reduce early school leaving. Vocational grammar schools — the path with a higher element of general education — will be renamed 'technical schools' and lead to a general secondary education degree and a vocational degree. Vocational secondary schools — for less academically inclined pupils — will be renamed 'vocational training schools'. Their first year will be dedicated to sectoral subjects, followed by 2 years of dual training. Pupils completing basic (lower secondary) education with major weaknesses may attend a '0' orienteering year to acquire the basic skills necessary for VET. Half or one-year-long basic skills development programmes will be offered to pupils who are unable to complete basic education.

Further steps were made to bring the worlds of education and work closer together. In 2018 the employment rate of recent VET graduates (ISCED 3 and 4) was 87.1%, well above the EU average of 79.5%. The Ministry for Innovation and Technology established the VET Innovation Council in September 2018 as a forum for dialogue between the government and stakeholders. Its tasks are to determine the direction of future developments and make recommendations for infrastructural developments and the content-related supervision of VET and adult training. From 2019-2020, in-company instructors are required to follow a course organised by the Hungarian Chamber of Commerce and Industry to obtain an instructor qualification.

Chancellors have been introduced in VET centres in line with the higher education model. The status of chancellor as senior manager appointed by the government was created from January 2019. The leadership of the vocational centre remains with the general director, while the chancellor will deal with various economic, financial, legal and labour-related issues and be responsible for overall asset management. The chancellor has the right of consent on all issues regarding the operation, structure and finances of the centre.

8. Developing adult learning

Promoting adult participation in learning remains a challenge, especially among the unemployed. Only 6.0% of adults participated in recent adult learning, well below the EU average of 11.1%. People in employment are about four times more likely to participate in training than unemployed people. In 2017 there were 858 000 adults (aged 25-64) with only a low-level of educational attainment, but only 438 000 corresponding jobs with an elementary skills requirement. 50% of the adult population (aged 16-74) have an insufficient level of digital skills, against the EU average of 43% (European Commission, 2019). This suggests that a substantial upskilling effort focused on the population with low skills is needed.

Skills shortages are comparatively high in Hungary. The number of registered unfilled positions decreased somewhat in the first quarter of 2019 but remains high at 34% more than at the same time in 2017 (KSH, 2019). In VET, much emphasis has been put in recent years on adapting the curriculum to the immediate needs of companies. Though manufacturing companies report mainly a need for vocational secondary school graduates with practical training experience, they value these employees in all physical occupations less than employees from vocational grammar schools (Köllő, 2018).

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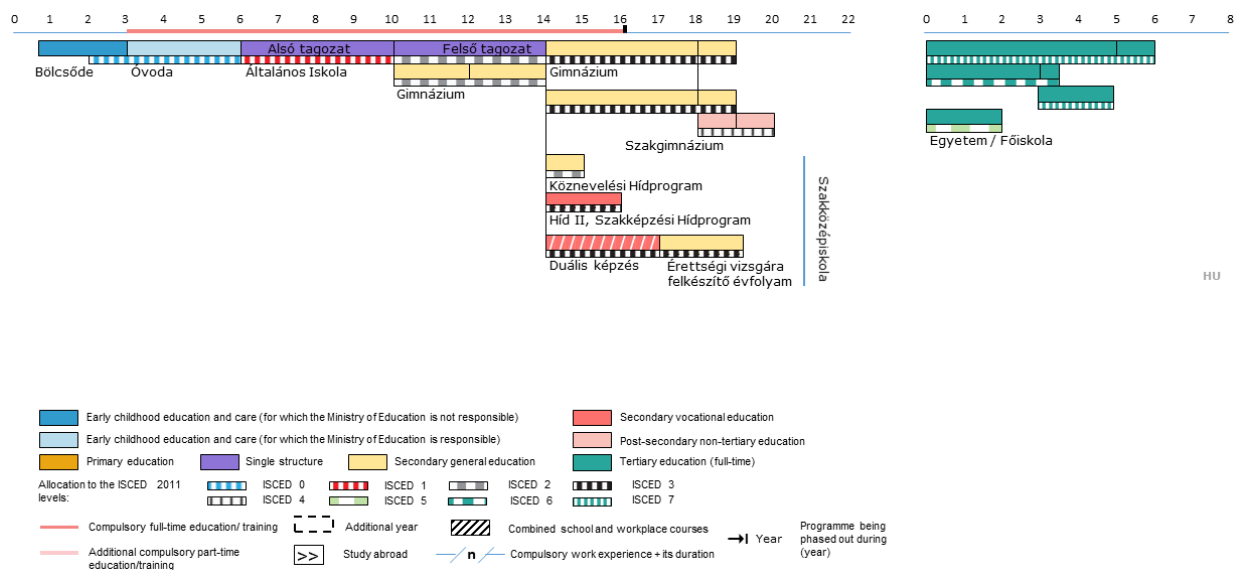
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Annex I: Key indicator sources

Indicator	Eurostat online data code
Early leavers from education and training	edat_lfse_14 + edat_lfse_02
Tertiary educational attainment	edat_lfse_03 + edat_lfs_9912
Early childhood education and care	educ_uoe_enra10
Underachievement in reading, maths, science	OECD (PISA)
Employment rate of recent graduates	edat_lfse_24
Adult participation in learning	trng_lfse_03
Public expenditure on education as a percentage of GDP	gov_10a_exp
Expenditure on public and private institutions per student	educ_uoe_fini04
Learning mobility:	
- Degree-mobile graduates	JRC computation based on Eurostat / UIS / OECD data
- Credit-mobile graduates	

Annex II: Structure of the education system



Source: European Commission/EACEA/Eurydice, 2018. The Structure of the European Education Systems 2018/19: Schematic Diagrams. Eurydice Facts and Figures. Luxembourg: Publications Office of the European Union.

Comments and questions on this report are welcome and can be sent by email to:
 Livia RUSZTHY
Livia.Ruszthy@ec.europa.eu
 or
EAC-UNITE-A2@ec.europa.eu

Executive summary

Highlights of the cross-national analysis
Highlights of the country analysis



Highlights of the cross-national analysis

Among all factors in the school environment, teachers are considered to have the greatest impact on students' learning outcomes. At the same time, more than 60%¹⁰ of public expenditure in education in the EU is spent on teachers. Any policy effort seeking to improve educational outcomes – or the efficiency of education and training – is bound to take a close look at the role of teachers and look for ways to help teachers excel in their demanding profession. New evidence from the OECD TALIS survey sheds more light on teachers. The recent survey data inform the 2019 Education and Training Monitor, which contains a dedicated analysis of school teachers in the EU. Being a unique source of information on teachers' motivations, lifelong learning and careers, the new evidence from TALIS 2018 can help policy-makers harnessing the full potential of teachers by preventing and addressing challenges.

After the teacher-dedicated part, the 2019 Monitor sets to analyse the existing targets adopted by the Council of the European Union under the strategic framework for European cooperation Education and Training 2020 ('EU benchmarks'). This part of the report presents latest data on participation in early childhood education and care; early leaving from education and training; tertiary educational attainment; underachievement in basic skills; employment rate of recent graduates; adult learning; and learning mobility in higher education. Next, the 2019 Monitor offers analysis on education indicators used in other well-established or emerging priorities, including entrepreneurship education; digital education; multilingualism. The report concludes with a section analysing public investment in education and training.

At the core of learning: the teachers

Across the entire EU, education systems are confronted with a number of challenges relating to teachers. Several countries already face or are about to face shortages of teachers, either across the board or in particular subject areas (typically science, technology, engineering and maths); or in particular geographical areas. In view of the proportions of teachers aged 50 or plus, the 23 EU countries participating in TALIS 2018 will have to renew about one third of their teaching population in the next decade or so. At least five EU countries will have to renew around half of their secondary school teachers in the same period (Italy, Bulgaria, Lithuania, Estonia, Greece and Latvia; and the same applies to primary school teachers in the former three countries).

Successfully renewing the teachers' population requires acting upon key factors such as the number of students deciding to embark on teacher education, the number of new teachers starting in the job and the number of teachers stopping to work. To address this challenge, there is a need to improve the attractiveness of the profession and offer good working conditions for sustained professional activity.

According to survey data, only 18% of lower secondary school teachers in the EU consider their profession as valued by society; and their proportion lowers with longer years of teaching experience. Similarly, the share of teachers would still choose to work as teachers, declines significantly, in several EU countries, among more experienced teachers. Overall, there is a specific challenge in attracting men into teaching; and particularly so for primary and pre-primary education, where the proportion of female teachers reaches 85% and 96% respectively.

Salaries of teachers do not always compare favourably to salaries of other equally qualified professionals. Among EU countries with available data, in four countries (Czechia, Slovakia, Italy and Hungary) teachers at all education levels earn less than 80% of what other tertiary-educated workers do. In most Member States, primary (and especially pre-primary) teachers earn less than secondary level teachers. In secondary education, teachers' statutory salary tends to be higher at upper-secondary level than at lower-secondary level.

There are also shortages of teachers with specific profiles. Nearly 40% of principals in lower secondary schools in the EU declare that the shortage of teachers teaching students with special

¹⁰ DG EAC calculation on Eurostat's general government finance statistics, reference year 2017 ([gov_10a_exp](#)).

needs hinders the quality of instruction at their school. Principals also point to shortages of teachers who have competences in teaching in a multicultural or multilingual setting (the largest shortages are in France, Italy and Portugal); and competences in teaching students from socio-economically disadvantaged homes (largest shortages in France, Italy, and Portugal). This second type of shortage is driven by change (technology; diversity in classrooms) and points to a need to improve training (initial and continued).

Furthermore, against an evolving technological and demographic background, teachers need new skills more than ever, including for dealing with cultural and linguistic diversity in the classroom, teaching in a technology-rich environment, and adopting collaborative teaching practices. While 92% of teachers report regular participation in professional development, 21% of them declare a further need for training on teaching students with special needs; 16% report a further need for training on the use of information and communication technology (ICT) for teaching; and about 13% report a further need for training in teaching in multilingual and multicultural environments.

Growing participation in education and educational attainment: main achievements in the last decade

In the last decade, the EU experienced a massive increase in tertiary educational attainment and met its target of having at least 40% tertiary graduates in the 30-34 year-old population – up from 32% in 2009. Despite this increase, there are clear patterns of inequalities in educational attainment. For example, on average, women's tertiary educational attainment (45.8%) is higher than men's (35.7%) – and the gap has been continuously increasing over recent years. Typically, women complete tertiary education earlier than men do. Also, young adults born in the reporting country or elsewhere in the EU, graduate more than their peers from non-EU countries (41.0% against 35.8% respectively). Yet, an overview of policy measures to broaden tertiary educational attainment shows that less than half of EU countries set specific targets to support participation in higher education of under-represented groups, such as, for example, people with disabilities, migrants or students from disadvantaged background.

The attendance of children from the age of 4 in early childhood education has expanded, and is, by now, almost universal. There are also high rates of participation in early childhood education by children from the age of 3. Yet the 90% participation rate for the general population decreases to 77.8% in the group of children at risk of poverty or social exclusion. Experiencing education in the early years of life has been found to be beneficial for better learning outcomes later on in life, and particularly so for children from socio-economically disadvantaged homes. The challenge of ensuring equal access to education in the early years needs to be addressed.

Since the EU cooperation framework in education and training started in 2009, the proportion of young adults leaving education and training without obtaining at least an upper secondary qualification has considerably reduced. Nonetheless, at EU level this process came to a halt after 2016. Comparing 2016 and 2018, there was progress on this indicator in large countries such as Spain or Poland, as well as in other countries such as Romania, the Netherlands and Portugal. However, this was countered by negative developments in other countries – for example, Italy, Sweden, Denmark, Slovakia, and Estonia (in descending order by size of population). Furthermore, in the past 2 years, early school leaving rates increased for both young adults born in the EU (between 2016 and 2017) and those born outside (between 2017 and 2018). Reducing early leaving remains a priority and a target of the EU, as those who leave education and training before obtaining an upper-secondary diploma will struggle with lower employment rates and lower rates of participation in adult learning.

The main challenge for the next decade: improving learning outcomes at school, and increasing adult participation in learning

Participation in education can be measured by data on enrolments, qualifications, or performance test. The latter show that reducing the number of underachieving 15-year-olds to meet the EU

target of less than 15% by 2020¹¹ remains a challenge, particularly for pupils from disadvantaged socio-economic backgrounds. Failing to achieve basic mathematics, reading or science tasks at the age of 15 impacts on individuals' chances to continue studying, find and maintain employment later in life, cope with fast-paced technological change, and develop as citizens. Between 2012 and 2015, the EU has actually moved further away from meeting this target. Approximately one fifth of pupils in the EU cannot complete basic reading tasks, and the share is slightly higher for science and maths (2015 data). Despite less favourable or sometimes adverse background conditions, around a quarter of socio-economically disadvantaged pupils born in another country are considered academically resilient. Individual factors associated with higher resilience include high academic expectations, and not repeating grades; while disengagement from school (for example skipping classes, and abusing substances) has a negative association with resilience. At school level, the use of school evaluations, connecting the students' test results to teachers' performance, adequate provision of study rooms and being surrounded by pupils with higher socio-economic status are all factors correlating positively with resilience.

Over the years, there has been limited growth in the share of adults participating in education and training during the last 4 weeks in the EU – from 9.5% in 2008 to 11.1% in 2018. In addition, in practically in all EU countries people with little or no qualifications in education – those most in need of access to learning – are the least likely to benefit from it. Age and educational attainment matter when it comes to adult participation in learning. Young adults (25-34) are more than four times more likely to participate in learning as those aged 55-64. Similarly, those with a tertiary degree are more than four times more likely to participate in learning than those holding at most an upper-secondary diploma.

Developing competences for future life and employment

Research has long established the positive outcomes of being able to study abroad. Transnational learning mobility is associated with future mobility, higher earnings, and lower risk of unemployment. 'Making learning mobility a reality for all' is one of the objectives of the European Education Area¹². In 2017, 11.6% of higher education graduates 'were mobile', meaning that they studied partially or entirely abroad. About 8% of them were abroad for short-term periods, while 3.6% graduated in another country. The Erasmus+ programme supported about half of the short-term study periods spent abroad by EU graduates. Overall, Luxembourg, Cyprus, the Netherlands, and Finland (in descending order) have high shares of mobile graduates. As to inward mobility, capturing the volume of students coming into a country for a period of study, it can be read as a measure of the attractiveness of the education system. On this indicator the United Kingdom leads the way – both in percentage of inward graduates and in absolute numbers.

There are a number of key competences (or combination of knowledge, skills and attitude) that can support an individual's life chances and also easier transition to the labour market and career job prospects. For example, participation in entrepreneurship education increases the likelihood of engaging in entrepreneurial activities later in life by 35% on average. Of this 35%, a 7 percentage point increase is due to improved self-perceptions by participants of their entrepreneurial skills. However, available data show that participation in entrepreneurship education in the EU is mostly optional, and only a handful of countries make it compulsory.

Furthermore, the potential of digital technologies in improving educational practices is being held up by challenges that education systems still face. To successfully undergo digital transformation, schools need to support teachers' digital competence for pedagogical use, design innovative pedagogical approaches, and provide digital equipment as well as better connectivity. Capacity

¹¹ Data for this benchmark come from the OECD PISA survey. Students scoring below level 2 are considered underachievers.

¹² In November 2017, EU leaders met in Gothenburg to discuss the social dimension of Europe, including education and culture. As part of the debate on the Future of Europe, the Commission set out its vision and concrete steps to create a European Education Area by 2025. One of the main objective of the European Area of Education is 'making mobility a reality for all', by building on the positive experiences of the Erasmus+ programme and the European Solidarity Corps and expanding participation in them, as well as by creating an EU Student Card to offer a new user-friendly way to store information on a person's academic records. Other measures to boost mobility under the European Education Area include initiating new processes to ensure the mutual recognition of diplomas; improving language learning; creating a network of European universities; and supporting teachers and their mobility.

building for digital assessment needs to be implemented for learners, teachers, schools and education systems.

Moreover, speaking several languages can increase individuals' employment prospects. Overall in Europe, between 2005 and 2015, the number of pupils who experienced compulsory language learning grew both in primary and secondary education. As to the former, 83.7% of primary school children learned at least one foreign language in 2014, against 67.3% almost a decade before. At lower secondary level, 59% of pupils learned two languages in school in 2015, against 46.7% in 2005.

After reaching the lowest point in 2013 (75.4%), the employment rate of recent graduates has been continuously increasing in the EU. With 81.6% in 2018, the rate is now close to the pre-crisis 2008 level of 82%. However, some countries still suffer from the effects of the crisis on employability of recent graduates – in particular Greece and Italy, where employment rates of recent graduates are around 55%. As compared to secondary graduates holding a vocational qualification, those with a general orientation qualification have a less easy transition into the labour market (66.3% against 79.5%). The employment rate of tertiary graduates was at 85.5% in 2018.

Public investment in education

In 2017, EU Member States invested, on average, 4.6% of their gross domestic product (GDP) in their education systems. This proportion has been slightly but continuously decreasing in the last few years, down from 4.9% in 2014. On average, EU countries spend about one third of their public expenditure for education on pre-primary and primary education; 41% on secondary education; and 15% on tertiary education. Looking at different education sectors, real expenditure on secondary and post-secondary education decreased (-1.3%, between 2016 and 2017) and increased in pre-primary and primary education (+ 1.4%), as well as tertiary education (+ 1.7%). So far trends in education expenditure have been largely independent from demographic developments, with the partial exception of expenditure on tertiary education. Due to the predicted school-age population decline in many EU countries, even constant spending on education is likely to result in an increase in spending per student.

Highlights of the country analysis

Austria

To avoid teacher shortages, Austria needs to attract enough students into initial teacher education and improve continuing professional development. Investment in higher education aims to improve the study environment. Improving digital competence is a priority in the education and training system. Discontinued recent reforms may weaken efforts to integrate students with migrant backgrounds and to improve education outcomes of students from a socially disadvantaged background.

Belgium

The Flemish Community (BE fl) will implement reforms at all levels of education, including dual learning, starting in September 2019. The French Community (BE fr) will also implement school reforms, starting with changes to governance, then the new extended common curriculum and reforming initial teacher education from September 2020. Education spending in Belgium is among the highest in the EU, but educational outcomes are comparatively low, suggesting room for increased efficiency and effectiveness. To reduce inequality and improve outcomes, teachers need more support to manage diversity in the classroom. Tertiary educational attainment is high but disparities remain between regions and groups.

Bulgaria

The modernisation of the education and training system continues while quality, labour market relevance and inclusiveness remain challenging. Demographic trends and rising skill shortages suggest that Bulgaria needs to invest better in the skills of its current and future workforce. The need to upskill and reskill the adult population is high while participation in adult learning is low. The status of the teaching profession is low, and the teacher workforce is ageing. Salaries are being increased as a means to boost the attractiveness of the profession. Steps have been taken to increase the labour market relevance of vocational education and training (VET).

Croatia

Pilot implementation of curricular reform and ambitious preparations for full implementation are under way. Reforms are under way in vocational education and training. Participation in early childhood education and care is held back by shortages of teachers and places. Plans to expand the very short average instruction time could help to improve low education outcomes.

Cyprus

The teaching profession is highly attractive. Reforms to upgrade it are promising but need to be sustained and expanded. Reforms are implemented to foster high-quality public early childhood education and care. However, provision is insufficient for the early years. Tertiary education attainment has risen further but underutilisation of skills remains a challenge given the specific features of the Cypriot labour market. Measures have been taken to upgrade vocational education and training and adult learning, but attractiveness of both sectors and participation in them remain low.

Czechia

Czechia continues to make vocational education and training more relevant to the needs of the jobs market. Authorities are making good use of EU funds to support reforms. Inclusive education is progressing but measures targeted at Roma remain limited. The attractiveness of the teaching profession remains low.

Denmark

Changes to university education are making it more flexible and labour market friendly, but the need for more STEM graduates remains. The number of apprenticeships has been increased and measures are being taken to promote adult learning. Reduced education spending is having an impact on schools and universities. There is considerable local variation in the education performance of young people from migrant backgrounds.

Estonia

Estonia is developing an education strategy for 2021-2035, aiming to bring gradual changes to the system to respond to changes in the labour market and society. Due to demographic trends and

the limited responsiveness of the education and training system to labour market needs, aligning skills supply and labour demand remains a challenge. The ageing of the teaching population coupled with the low attractiveness of the teaching profession are a long-term challenge for the functioning of the education system. Participation in adult learning has reached a record high but the need for upskilling and reskilling remains high.

Finland

While teaching is a prestigious and attractive profession, there are teacher shortages for kindergarten and special needs education. There has been some growth in education inequalities, and spending on education has fallen. New policy measures aim to improve the quality, effectiveness and internationalisation of higher education. Demand for graduates in Information and Communications Technology (ICT) is high and difficult to meet. Implementation of vocational education and training reform is ongoing, and reforms are planned to foster adult learning.

France

Work continues on improving educational outcomes and reducing inequalities, with support for teaching staff and funding measures. A new law on education extends the length of compulsory education and training to 3-18. Authorities are faced with the challenge of combining the rapid pace of reforms with the need to consult stakeholders to ensure good ownership and optimal impact. Implementation of the vocational education and training reform is in full swing.

Germany

Germany has announced significant investments in digitalisation, higher education and research in the decade ahead, but as well in school education. Germany is preparing for fundamental change in the skills of its workforce by carrying out digital initiatives and by refocusing the system of adult learning. The teaching workforce is aging and Germany faces a challenge to replace a large number of teachers. Young people from disadvantaged socio-economic and/or migrant backgrounds continue to lag behind in educational attainment.

Greece

The teaching profession is highly attractive in Greece but opportunities and incentives to improve professionalism are lacking. Education expenditure is lower than in most EU countries and largely spent on salaries. Early school leaving has been further reduced, particularly in rural areas. Finding employment after education remains difficult, including for highly qualified people. Measures to tackle the brain drain of tertiary graduates are being implemented but internationalisation of Greek universities is underdeveloped.

Hungary

Recent measures have raised the qualification levels of staff in early childhood education and care. Measures to reduce performance gaps between pupils have been strengthened. Admission conditions for entry to higher education have been made more restrictive. A new medium-term strategy aims to modernise vocational education and training and adult education.

Ireland

Ireland has a strong framework to ensure highly qualified teachers and further plans to meet emerging needs, including teacher shortages. Early school leaving has continued to decline, and participation in early childhood education and care is to be supported by new national schemes. Despite increased public spending on education, investment in higher education has not kept up with rising student numbers. Ireland implements initiatives aimed at upskilling and increasing adult participation in learning and training but the numbers of low-skilled adults in the population remain sizeable.

Italy

Italy invests well below the EU average in education, particularly in higher education. The share of teachers satisfied with their jobs is among the highest in the EU, but only a small share believe that theirs is a valued profession. Compulsory work-based learning in vocational education and training could help provide more structured training for apprentices and ease the transition from education to work. The level of tertiary educational attainment is low, and the transition from education to work remains difficult, even for highly qualified people.

Latvia

Latvia has already met and exceeded its Europe 2020 education targets. Latvia should achieve further improvements in learning outcomes through the new competence-based curriculum, a stronger individual approach to students at risk and support for inclusion of students with special educational needs. Enrolment in vocational education and training (VET) is increasing and the employment rate of VET graduates is improving, although both remain below the EU average. In higher education, a gradual increase in investment and incremental changes in quality assurance are welcome, but the sector remains fragmented and international competitiveness low.

Lithuania

Current trends in student population and teacher workforce call for a comprehensive strategy to manage teacher supply and demand. Improving key competences and relevant skills remains a priority at all levels. Further development of monitoring and evaluation systems may help improve the quality of education and training. Measures have been put in place to increase the education system's overall efficiency, but further efforts are needed to ensure their implementation. Policy measures to address low participation in adult learning are lacking.

Luxembourg

In 2018, more flexible entry requirements for the recruitment competition for early childhood and primary education teachers attracted more candidates. Pupils' performance is heavily influenced by their ability to cope with the trilingual system. A reform of the orientation process at the end of primary education may have stopped a trend whereby many pupils were being guided to the lowest track in secondary education. Employment rates among recent graduates from all types of education are significantly higher than the EU average.

Malta

Work is underway to improve the quality of teaching and the attractiveness of the profession. Improving the quality of investment in education and developing monitoring and assessment are key challenges. Increased participation in early childhood education and care and the new secondary system may help reduce the number of early school leavers. While participation in tertiary education is increasing, its labour market relevance is still a challenge.

Netherlands

The early school leaving rate is below the Europe 2020 national target but has slightly increased. The Netherlands faces an increasing shortage of teachers, both in primary and secondary education. The 2019-2022 Quality Agreements aim to improve the quality of vocational education and training. Dutch tertiary education increasingly attracts foreign students.

Poland

Early school leaving continues declining and participation in early childhood education and care among children under 3 remains low. The higher education reform has been launched, bringing major changes to the functioning of higher education institutions. Implementing the 2017 school system changes is causing organisational, financial and curricular challenges. Further challenges relate to teachers' pay, emerging shortages, and initial and continuing training. Participation in adult learning remains low.

Portugal

Teachers are satisfied with their jobs, but the ageing teacher population, the high proportion of non-permanent staff and weaknesses in induction and continuing professional development remain challenging. Investment to upgrade infrastructure is insufficient, particularly for early childhood education and care in metropolitan areas. Regional disparities in education outcomes, grade repetition and early school leaving rates are improving. Tertiary educational attainment has grown but business demand for ICT specialists exceeds supply. There is a significant proportion of low qualified adults while participation in adult learning remains low.

Romania

Concrete ideas have been presented for major reform of the education and training system. Clear steps need to be taken for the implementation of the reform. Public spending on education is low in EU comparison, while the sector's investment needs are high. Any major reform is likely to require additional funding linked to stronger equity and efficiency mechanisms. Better support for teachers – in particular by redesigning initial teacher education and strengthening continuing professional

development – can help improve quality and equity. Efforts were made to expand dual education. Participation in adult learning remains low despite the high need for upskilling and reskilling.

Slovakia

Slovakia is improving early childhood education and care, which is particularly positive for children from deprived families. Slovakia is taking a more strategic approach to lifelong learning, upskilling and reskilling. The early school leaving rate has continued increasing since 2010, approaching 14% in Eastern Slovakia. Investment in education and training is insufficient, and this is reflected in teachers' still low salaries despite recent increases.

Slovenia

Enrolment in early childhood education and care is approaching the EU benchmark. The proportion of Slovenian upper secondary students enrolled in vocational education and training is one of the highest in the EU, and the employment rate of such graduates is high. There are enough new entrant teachers but large numbers are approaching retirement and shortages already exist in certain categories. Tertiary educational attainment is high, but the differences between men and women and the native-born and foreign-born population are large.

Spain

The teaching profession is attractive, but working conditions differ among regions and between public and private education systems. Private spending in education is significant, while public spending is static compared to GDP. Planned reforms, reflecting political uncertainties, have been slowed down. The process to modernise vocational education and training is ongoing. Adult participation in education is slowly rising.

Sweden

Tertiary educational attainment and graduate employment rates are high. The population's digital skills are among the best in the EU. There is a serious teacher shortage, and a large number of teachers lack formal qualifications. School segregation and inequality are serious and growing concerns.

United Kingdom

Efforts are being made to tackle the high proportion of teachers leaving the profession. In England, school academies are growing in number but many are facing financial pressures. The consequences of Brexit for UK higher education are unclear but policy responses to address the potential loss of EU research funding and reduced student inflows will be needed. England will introduce new qualifications as part of ongoing reforms of upper secondary VET.

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Luxembourg: Publications Office of the European Union, 2019

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PRINT	ISBN 978-92-76-09386-2	ISSN 2466-9989	doi: 10.2766/253509	NC-AN-19-010-EN-C
PDF	ISBN 978-92-76-09388-6	ISSN 2466-9997	doi: 10.2766/019060	NC-AN-19-010-EN-N

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