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“Lifelong Learning” – A New Term for an Old Idea? The Search for Historical Roots

Abstract: The article seeks to correct the assumption that “lifelong learning” was only invented by educationists in the 1970s. In contrast to the numerous authors who regard E. Faure’s 1972 book “Learning to be” as the origin of “lifelong learning”, we refer back to Cyril O. Houle, and his remarkable publication of 1961, “The Inquiring Mind,” as the father of “lifelong learning” in a modern sense. Cyril O. Houle suggested that the roots of “lifelong learning” lay in ancient Judaism. The article follows this guideline and marks out the main stages of this genealogy: ancient Judaism as a learning community, lifelong learning in Torah and Talmud, the Haskala as the link with educational practice in Germany, and finally the function of the “houses of teaching” (Lehrhäuser) in the Weimar Republic (Buber, Rosenzweig, Simon) as places of lifelong learning in both its religious and its secular sense.

Key words: Cyril O. Houle, lifelong learning, Judaism.

The current attempts to distinguish between the terms “lifelong learning”, “lifelong education” and “permanent education”, and the rivalry for the *jus primae noctis* – who was the first to use them?² – put one in mind of the common-place saying that “originality is often nothing more than as yet undiscovered plagiarism”. If this is applied to the present case³, it means that apparent modernity

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² The terms are sometimes identified almost schematically with particular international or supranational organisations – lifelong learning with the OECD and, since 2000, especially with the EU, lifelong education with UNESCO, and permanent education with the Council of Europe. However, the generally accepted terms “lifelong learning” and “adult learning” (for the adult education element within an overarching concept of lifelong learning) have now become standard.

³ The newly established internet platform www.elli.com, which was initiated and is sponsored by the German Bertelsmann-Foundation, derives the term lifelong education from Jacques Delors’ writings and the publications of the Delors-Commission -, see: Joachim, H. K. (1996). *Internationale Weiterbildung und Erwachsenenbildung*, Darmstadt, p. 74 ff – and thereby is highlighting targets such as flexibility, mobility and employability.

and uniqueness are mere pretence and that the debt owed to longer-standing tradition is deliberately ignored through historical slovenliness. At long last, the custom of using lifelong education or lifelong learning rhetorically as an inaccurate synonym for adult education has vanished from educational discourse, and more particularly from the flowery language of formal speeches. Instead, lifelong learning now stands for “the totality of all formal, non-formal and informal learning throughout a person’s entire life cycle”, as just one of many definitions puts it.⁴

Of course, this does not remove all confusion, or answer such questions as who thought up the idea, whether there is a consensus as to the content and future nature of lifelong learning, and whether there is still some lingering scepticism over recent developments and the replacement of the term “education” by “learning”.

Two examples may be given of this relative lack of certainty. Paul Bélanger⁵, the former Director of the UNESCO Institute for Education and therefore very familiar with the recent origins of lifelong learning, particularly in the context of education policy, has made the following observation about the early stages of lifelong learning in the 1970s:⁶ “The lifelong education in the early seventies was a euphoria built on the post-war belief in an endless prosperity. But the petrol crisis together with the decline of the welfare state brought rapidly the euphoria to an impasse.” There is an unmistakable note of scepticism here, which results perhaps from Bélanger’s identifying lifelong education too narrowly with the immediate time frame, thereby tying the concept and its achievability to economic conditions that were by their nature temporary and did not in the end have a lasting impact on education.

The essay by John Field entitled “Has ‘lifelong learning’ had its day?”⁷ caused particular controversy in 1998 when he was the first to be appointed to a chair in lifelong learning at the University of Sterling in Scotland. But this nagging question was probably not intended to be quite so provocative, since it leads

⁴ Unabhängige Expertenkommission Finanzierung lebenslangen Lernens, in: *Der Weg in die Zukunft*, Berlin July 2004.

⁵ Bélanger, P. (1997). *The Astonishing Return of Lifelong Learning*. In: National Institute for Educational Research/UNESCO Institute for Education (NIER; UIE) (eds.), *Comparative Studies on Lifelong Learning Policies*. Tokyo, p. ix.

⁶ The idea that the origins of lifelong learning can be seen as falling into two stages goes back to Kjell Rubenson: Rubenson, K., *Livslangt lärande*. In: Ellström P. et al. (eds.), *Livslangt lärande*. Lund 1996. According to Rubenson, the first decade may be named after Edgar Faure’s “Learning to be” (Paris 1972), and is associated primarily with the early UNESCO term “lifelong education”, while the second stage, led by the EU and the OECD in the 1990s, and now almost exclusively using the term “lifelong learning”, begins with EU documents such as the White Paper on Competition and Growth (1993) and the White Paper on Teaching and Learning (1995), is first set out prominently in print in J. Delors’ “Learning -The Treasure within” (1996), and is subsequently promulgated in forward-looking EU implementation models such as the “Memorandum” (2000) and the European Qualification Framework (EQF 2005).

⁷ Field, J. (2006). *Has ‘lifelong learning’ had its day?* In: *Adults Learning*, p. 16

on to a clear, well thought-out plea for the concept of lifelong learning, in which he states at one point that lifelong learning has widespread support and is clearly in adults' own interest on economic and social grounds.

In the brief discussion that follows, we shall be guided by the notion that lifelong learning does embrace "the totality of all formal, non-formal and informal learning throughout a person's entire life cycle" and that accordingly, the content of learning should not be restricted to one segment of human development or education (such as religious education or vocational training).

In a recent paper on 'Cy' Houle's "The Inquiring Mind"⁸ I have tried to demonstrate that the very date when his book appeared – 1961 – gives the lie to the over-hasty assumption that lifelong learning can be traced back to E. Faure and his 1972 publication "Learning to be". If we look at the way in which Houle sets out his argument, at his careful cultural analysis and his detailed answering of the empirical question of why adults continue learning, and at his consequent typology of human learning behaviour, it is undoubtedly right to regard Houle as the father of the present-day theory and practice of lifelong learning. His publication may indeed be an example of the principle that ideas must appear at the proper time if they are to be accepted and evoke an appropriate response. In Germany, 'Cy' Houle remains a largely unknown educationist, and his writings are not found on the shelves of academic libraries, while in America he is among the classics, and he is still read rather than just being quoted reverentially.

Why do I mention him at this point? Simply because instead of claiming to be original, he looks back to those predecessors with whom he finds common ground in the notion of lifelong learning and lifelong education. An awareness of history is present in all Houle's publications, including those on lifelong learning.

He makes clear that he is not alone in seeing a link between lifelong learning and "Judaism as a learning community"⁹, not least because learning does not relate solely to the religious dimension in that context but is invariably concerned also with how to shape and manage life in the here and now.

This Jewish origin of lifelong learning, in the "religion of education", has yet to be generally accepted. One reason why such a view is not shared by the majority of members of the "guild of educationists" relates undoubtedly to present-day methods of theory formation, which frequently ignore religious and

⁸ Cyril, O. H. (1961). *The Inquiring Mind, A Study of the adult who continues to learn*. Madison: The University of Wisconsin Press.

⁹ This is the title of a paper by Ralf Koerrenz, *Das Judentum als Lerngemeinschaft. Die Konzeption einer pädagogischen Religion bei Leo Baeck*, Deutscher Studienverlag, Weinheim 1992

historical references.¹⁰ In the context of adult education at least, it is evident that the rarity of historical cross-references scarcely encourages such a quest.

Where can we find the evidence to confirm this assertion of the Jewish origin of lifelong learning? In the first place, in the not inconsiderable number of Jewish adult educationists in our own time, among whom I shall only mention Eitan Israeli und Kalman Yaron because they are known here.¹¹ If we go back to the Weimar Republic, we may also think of figures such as Rosenzweig, Buber, Baeck and Simon, about whom we shall more to say later.

We cannot here go into the various principles put forward in religion,¹² but will merely call attention to a few places in the Torah and the Talmud which may be regarded as pointing to both the religious and the everyday notion of lifelong learning. Among other places in the Torah, it is chiefly 5 Moses 6, 4-7; 5 Moses 11, 19; Sayings of the Fathers 4, 12; and Joshua 1, 8 which define learning as a religious duty, not only on holy days but as a continuous process that starts in early childhood (“Ye shall teach your sons”) and is not intended ever to end (“For as long as thou hast not attained wisdom and understanding thyself, seek out men of experience and do not be ashamed to learn and to ask”¹³). In the Talmud, which contains a set of practical religious rules for living in order to “anchor the Torah among the people by teaching ‘many pupils’, by providing Halakah judgments and rulings on everyday life, and by bringing the Torah up to date and providing a commentary,”¹⁴ the general utterances in the Torah about learning are spelt out more fully in the context of the ways in which learning is transmitted

¹⁰ I specifically exclude from this remark the Jena educationist Ralf Koerrenz, who has regularly examined in depth the educational dimension of Jewish religion and religiosity. A short paper entitled “Human being – learning being” (“Lebewesen Mensch – Lernwesen Mensch”) contains the almost apodictic statement in relation to Leo Baeck that: “the core of Jewish religion is concerned with the inescapable quest for one’s own meaning, with coming to see and to shape one’s life as an open-ended process of learning that can never be complete.” Ralf Koerrenz. *Lebewesen Mensch - Lernwesen Mensch. Perspektiven für den jüdisch-christlichen Dialog im Anschluss an Leo Baeck*, in: *Leo Baeck - Zwischen Geheimnis und Gebot, Auf dem Weg zu einem progressiven Judentum der Moderne. Beiträge von Tagungen der Bertelsmann Buch AG, der Evangelischen Akademie Baden und der Evangelischen Akademie Berlin-Brandenburg (=Herrenalber Forum, Band 19)*, Karlsruhe 1997, p.246 ff.

¹¹ See their several articles in the *International Yearbook of Adult Education (Jahrbuch der Erwachsenenbildung)*, ed. J. H. Knoll, Cologne, 1967 ff

¹² See esp.: Volkhard Krech, *Wohin mit der Religionswissenschaft? Skizze zur Lage der Religionsforschung und zur Möglichkeit ihrer Entwicklung*, in: *ZRGG* 58, 2, 2006, p.97, and p. 100 on the relationship between the study of religion and that of culture and on the question whether the study of religion should be regarded as (a part of) the study of culture

¹³ From: “Musar Haskel” by Gaon Hai ben Scherina – 939-1038, quoted in A. Pfaffenholz, *Was macht der Rabbi?*, *Das Judentum*, Munich 1995, p. 148

¹⁴ Galley, S. (2006). *Das Judentum*. Frankfurt am Main, p. 61.

(“Schooling”¹⁵). In the introductory essay on the Talmud by Stemberger we read: “Every father had the personal duty to teach his sons the basic elements of religious education (Deut. 11, 19). Frequently, however, the father was not up to the task of being the teacher of his sons,... In Judaism, the religious nature of which depends so heavily on the Book, the Bible, and in which learning was a direct religious duty, there rapidly arose the need to establish a public education system.” Alongside such specific commands, which can be dated to the first century before Christ, there are also general injunctions, which have resulted in Judaism being depicted over the ages as a religion in which “intellectual questioning did not cease when faced with the religious.”¹⁶ Hence, the general duty to learn is stated as follows in the Babylonian Talmud, Tractate Shabbath 31 a, “Go and learn,” and elsewhere in the Babylonian Talmud, Tractate Kiddushin, 40 b, thus: “Rabbi Tarphon and the Elders were once assembled in the balcony of the Nithza house in Lod, and the question was raised whether learning or doing were greater. Rabbi Tarphon said: ‘Doing is greater.’ And Rabbi Akiva answered: ‘Learning is greater.’ All agreed that learning was greater, for learning leads to doing.”

Rabbinical stories assume that the ability to learn persists almost without limit even into old age. The notion that learning in adulthood plays a key role in the “Jewish paradigm of education” (R.Koerrenz) may therefore be demonstrated by one of the many variations on the story told about Rabbi Akiba, a 2nd century AD scholar, whose path through life and learning is summarised by S. Galley in the title: “From illiterate to exemplary scholar”¹⁷: “There are numerous overlapping stories told about the man. He is one of the few rabbinical scholars about whom the legends amount to an almost complete biography. For the first forty years of his life he was supposedly completely uneducated. It was his love for his wife Rachel that changed that. She demanded that he learn to read and write, which he finally did, together with his son. Rachel provided for the family so that Akiba could study. He strove for twelve years...”.

Such illustrations, which can only be mentioned in passing here, amount to a picture of Jewish learning that is not specific to class or social position and is seen as continuing throughout the whole of life, or life-long. It is therefore not unreasonable to describe learning in Judaism as the origin of the concept of life-long learning. There is no need to stress that this learning discourse did not have the distinct clarity of terminology associated today with lifelong learning, but the

¹⁵ See “Das Schulwesen”, in: Günter Stemberger, *Der Talmud, Einführung – Texte – Erläuterungen*, Munich 1994, p. 21.

¹⁶ e.g. Religion als Arbeit am Text, Aharon Appelfeld über sein Herkommen, in *NZZ* 22/23. 4. 2006, p. 32.

¹⁷ Galley, S. (2006). *Judentum*, op. cit., p. 67.

concept itself must be regarded as inherent to Judaism, and this relegates to the realm of legend present-day assumptions that lifelong learning is a modern trend.

The next question is obviously whether the evidence found in early Judaism leads on a consecutive genealogy. For a long time there was uncertainty over this, glossed over by recourse to claims that the bourgeois salon culture of the 19th century,¹⁸ for example, must have contained essential elements of Jewish religion and must therefore have had a bridging function, passing on ideas about learning. Today, as awareness of the *Haskalah* spreads, there is no longer any need of such flimsy arguments. Along with many other detailed investigations of phenomena and individuals that illuminate for us Jewish learning and Jewish education, we now have a comprehensive and carefully edited overview which is helping to close the gaps in our previous knowledge of the history of Jewish learning and German-Jewish education during and since the Enlightenment: this is the series “History of Jewish Education in Germany” (“Jüdische Bildungsgeschichte in Deutschland”), edited by Ingrid Lohmann, Britta L. Behm and Uta Lohmann. The volumes that have appeared so far provide key insights into school education during the Enlightenment, show the connections with Campe and Basedow, with the educational and school reforms of the philanthropists, and with the school reforms of the pupils of M. Mendelssohn, clarify the tensions within Judaism between Talmudic learning and Hassidic piety, and generally promote an understanding of learning and education illuminated by both religious observance and emancipatory rationality. In the statement by the Berlin Old Testament scholar J. W. Wellhausen, mysticism and wisdom, Kabbala and Talmud go together: “Jewish wisdom, although thoroughly religious, contains within itself the universalist principle inherent in intellectual enquiry.”¹⁹ This idea of the symbiosis between apparent contradictions is then taken up by the Orthodox Rabbi Nehemia A. Nobel in the claim that the “neo-Orthodox tradition [reinforces] the links between Torah and Derech Eretz” (the way of the land, secular culture).²⁰

From the series “History of Jewish Education in Germany” I shall only mention here the following volumes on topics that are of especial relevance in our context:

¹⁸Hazel Rosenstrauch, *Varnhagen und die Kunst des geselligen Lebens, Eine Jugend um 1800*, Berlin 2003. See my commentary on this in ZRGG 58, 2, 2006, p. 183f; also: *Salons der Romantik. Beiträge eines Wiepersdorfer Colloquiums, Zur Theorie und Geschichte des Salons* ed. Hartwig Schultz, Berlin 1994, esp. Konrad Veilchenfeldt, *Rahel Varnhagens “Geselligkeit”*, p. 147 ff

¹⁹J. W. Wellhausen, *Israelitische und jüdische Geschichte mit einem Vorwort von R. Smend*, Berlin 1894, photographic reproduction of the 10th edition, Berlin 2001, p. 210.

²⁰e.g. in the introduction by Evelyn Adunka and Albert Brandstätter (eds.), *Das jüdische Lehrhaus als Modell Lebensbegleitenden Lernens*, Vienna 1999

Mordechai Eliav, *Jewish Education in Germany in the Age of the Enlightenment and Emancipation (Jüdische Erziehung in Deutschland im Zeitalter der Aufklärung und der Emanzipation)*

Britta L. Behm, *Moses Mendelssohn and the Transformation of Jewish Education in Berlin (Moses Mendelssohn und die Transformation der jüdischen Erziehung in Berlin)* and

Ute Lohmann, Ingrid Lohmann (eds.), *Learn Reason..., Source Texts from the Age of the Haskalah (Lerne Vernunft..., Quellentexte aus der Zeit der Haskala)*.²¹

The source texts in particular highlight the consonant features of Jewish and Enlightenment education:

- the relationship between religion and reason,
- the teaching of morality, through “which those habits and ways of thinking that of themselves lead to actions for the public good are to be instilled into the people” (p. 18)
- and lastly, as a result of the Haskalah, education that is broad and embraces both common sense and academic learning, ethics and morality, and specifically fosters “the acquisition of reading and writing, fictional literature, and adoption of and dialogue with contemporary educational theory” (p. 18).

Unlike the previous volumes, that on M. Mendelssohn looks specifically at Mendelssohn’s relationship with the contemporary study of education, principally with Basedow, and at the lines connecting philanthropic educational theory and Jewish educational practice in the second half of the 18th century²².

Mendelssohn, who was moved at an early age to study the Talmud (“at six years of age he was teaching the Talmud and the traditional commentaries using the pilpulistic method”²³), taught his pupils, including the school reformer Naph-tali Herz Wessely, that the previous method of studying the Talmud needed to

²¹ Modechai Eliav, ..., *Jüdische Bildungsgeschichte in Deutschland*, Vol. 2, Münster 2001; S. Behm, *Jüdische Bildungsgeschichte in Deutschland* Vol. 4, Münster 2002; U. Lohmann, I. Lohmann, ..., *Jüdische Bildungsgeschichte* Vol. 6, Münster 2005

²² Recent publications detecting the ‘hidden relation’ between Humboldt and Mendelssohn: Hazel Rosenstrauch, *Wahlverwandt und ebenbürtig*, Caroline und Wilhelm von Humboldt, Frankfurt am Main 2009 and Manfred Geier: *Die Brüder Humboldt*, Reinbek bei Hamburg 2010; I am referring to Humboldts concept of Lifelong education (Litauischer Schulplan., Königsberger Schulplan, über „die innere und äussere Organisation..“) in : *Neue Wege der Humboldt-Forschung*, ZRGG 62, H 4, 2010 pp. 387. Forthcoming see: Julius H. Schoeps, David Friedländer, Freund und Schüler Mendelssohns, Hildesheim 2011.

²³ Günter Stemberger, op. cit., p. 311; pilpulistic (pilpul Hebr. pepper), originally a subtle method of Talmud teaching; in the figurative sense, hair-splitting.

be adapted to contemporary circumstances, chiefly by looking afresh at the text, incorporating the natural sciences and using the local language. Wessely offered a school timetable arranged according to age group and stage of development, listing new secular teaching content and allowing for the need to progress from what we would call “school to world of work” or “school to university” in accordance with differing ability and inclination. Wessely saw school, in the sense of a house of teaching and therefore close to the synagogue, as being open for further learning in adulthood, so that school and adult education formed a continuous, closely connected process of education. This is a totally modern approach, which we only rediscovered in lifelong learning in the 1990s, during its second stage.

At this point, we shall jump ahead, and emphasise once again that we are today encouraged, particularly by the EU and the OECD, to regard adult education as an element of lifelong learning, as a process that continues throughout individual lives and learning biographies. And this perception should rid us of the misunderstanding whereby adult education is thought of as something Other and pedagogy is said to differ from “andragogy”²⁴ on account of the distinct nature of the addressees, methodology and teaching methods.

If I am right, the Jewish understanding of education does not distinguish in this way between pedagogy and andragogy, stressing contrast and difference rather than the continuum. This was certainly the view taken in “houses of teaching” in the Weimar Republic, in which particular emphasis was placed on delivering “adult education with a Jewish spirit”.

During and after the Enlightenment, changes took place in education, in the context of which adult education established itself as an increasingly independent part of the education system, albeit at first solely through voluntary bodies and not yet being seen as a phase of continuing learning and education that followed on from school.

Here begins a part of its history which may be encapsulated in the terms *national education – popular education – adult education – continuing education*²⁵ and ultimately leads to the concept of lifelong learning. This history has been described competently on a number of occasions in recent years.²⁶

²⁴I observe that the term “andragogy” is gradually disappearing from educational discourse even in SEE countries (e.g. the draft for an Adult Education Act in Macedonia), and only occurs today in Holland, Slovenia and parts of Catholic adult education, while the study of adult education is called “andragology” by ten Haave. In America, M. Knowles tried to propagate the term years ago, but without much success.

²⁵I have described this development in an early collection of documents: *Von der Nationalerziehung zur Weiterbildung*, Cologne-Vienna 1980.

²⁶For an essential history of adult education see: Josef Olbrich, *Geschichte der Erwachsenenbildung in Deutschland*, Opladen 2001, and his bibliographical references; Wolfgang Seitter, *Geschichte der Erwachsenenbildung*, Bielefeld 2000, offers a phenomenological anti-chronological description of LL, but refers nonetheless to scarcely relevant international literature on the subject, p. 138f.

In the all but 200-year history of institutionalised adult education there has been no shortage of attempts to bind school education more closely to adult education, and adult education to the state, thereby removing the division of the education system into “pillars”. It is questionable whether this can be interpreted as a move towards the principle of lifelong learning, however, despite rhetorical statements to that effect. I regard Bonstetten, Tschokke and Scherr in 19th century Switzerland as genuine examples of such a “spirit” of lifelong education: building on the ideas on school education put forward by Pestalozzi, Fellenberg and Stapfer, they voiced the question of what should be done for the education of adults, since education could never be complete and necessarily continued until the end of people’s lives; “for as long as there is life and feeling”, as Bonstetten put it in 1802.²⁷

Such statements were made similarly in the context of German “popular education” (Volksbildung) and demonstrated the growing attention given to adult education in the course of the 19th century. Nonetheless, prejudices and divisions continued, particularly the separation between adult education, the state and the public education system.

At the start of the 20th century, however, and in the Weimar Republic, democratic thinking helped to break down the barriers between the sectors of education and the state. By way of example, we may point to two indicators of the shift in priorities. On the one hand, a constitution, that of the Weimar Republic, provided for the first time that: “Support shall be given to the national system of education, including adult education centres (Volkshochschulen).”²⁸ The national education conference of 1920²⁹ then revealed the independent thinking and self-perception of adult education, and highlighted the differences between “independent” and “tied” adult education,³⁰ calling for professionalisation and acknowledgement of the particular peculiarities of adult education.

In the Weimar Republic, in the spirit of Rosenzweig and Buber, the notion of lifelong learning was further strengthened by the “houses of teaching”; this is not to suggest that this development was unique in history, it has happened on

²⁷ Covered thoroughly by Philipp Gonon, *Lifelong Learning in the Mirror of Educational History*, in: Klaus Harney et al., *Lifelong Learning, One Focus, Different Systems*, Frankfurt 2002, p. 45 ff

²⁸ Constitution of the Weimar Republic, 1919, Article 148. W. Lande, *die Schule in der Reichsverfassung*, Berlin 1929, examines in depth whether this requirement implies an option or an obligation to support adult education, thereby defining adult education at that early stage as a “public task”. On the deliberations on the constitution see also Knoll, J. H. *Von der Nationalerziehung zur Weiterbildung*, op. cit., p. 123 ff

²⁹ *Die Reichsschulkonferenz in ihren Ergebnissen*, ed. Zentralinstitut für Erziehung und Unterricht, Leipzig n.d. (1921), p. 87 ff

³⁰ The misleading terms “independent” and “tied” were discontinued in the report “Zur Situation und Aufgabe der deutschen Erwachsenenbildung” by the German Education Committee in 1960, and the wording used thenceforth, reflecting the legal status of sponsors and institutions, is public and non-public adult education.

many occasions and in many places,³¹ but it should be recognised that the spirit of Jewish education helped to foster the concept of adult education.

Ernst Akiba Simon,³² an associate of Rosenzweig and Buber and a commentator on the political watershed of 1933, continued their perception of lifelong learning in the Jewish spirit. The paper “Development in Decline” (“Aufbau im Untergang”),³³ which made the widely respected lecturer at the Hebrew University of Jerusalem known far beyond adult education circles, refers to the function of adult education in creating political solidarity in the Jewish spirit, and in his ground-breaking publication “Our European and Jewish Asset of Education” he links the tradition of lifelong learning to the political and social situation of the present age. To begin with he makes a confession of faith in the words: “the Jewish way of living is in the end a way of living that has obligations,” and he continues elsewhere: “If Torah means shaping all of life, both that of the individual and that of the community, from a position of belief, it must give us pause for thought that it has increasingly retreated in the course of Jewish history into at most three areas: the home, the school and the synagogue, and that everything that used to be, commerce, politics and general culture, has remained outside. The attempt that we are making in Israel,..., culminates in drawing these areas back in. That is hard.”

The question may therefore be asked whether Simon would have agreed with the technical and organisational meaning ascribed to lifelong learning; he would probably have aligned himself with the resistance expressed as follows in an EKD publication: “If lifelong learning is restricted to the requirement to adapt throughout life to constantly changing commercial demands and goals, we must resist.”³⁴ Elsewhere, Simon’s biographer sums up as follows: “Jewish life is marked by a holistic multidimensionality, since it embraces in equal measure both cognitive and pragmatic learning processes, which are permanently intertwined one with the other. The cognitive dimension of traditional learning lies in the continuing discussion of religious texts... By combining the cognitive and pragmatic

³¹ e.g. in Adunka, E. and Brandstätter, A. (eds.) *Das jüdische Lehrhaus als Modell lebenslangen Lernens*, op. cit.

³² Jan Woppowa, *Widerstand und Toleranz, Grundlinien jüdischer Erwachsenenbildung bei Ernst Akiba Simon (1999-1988)*, Stuttgart 2005. W. provides an exceptionally perceptive account, in which knowledge of theological and intellectual history are compellingly combined. Profiles of Simon, Rosenzweig and Buber are given by the same author elsewhere: Jan Woppowa, *Zwischen Integration und Widerstand. Produktive Spannungen im Bildungsdenken Ernst Simons vor dem Hintergrund jüdischer Erwachsenenbildung nach 1933*, in: *Gespräch*, No. 10/2005, www.buber-gesellschaft.deders.de; Jan Woppowa, Ernst Simon, *Biographisch-bibliographisches Kirchenlexikon*, Vol. XXI, Cols. 1439-1446

³³ Ernst Simon, *Aufbau im Untergang, Jüdische Erwachsenenbildung im nationalsozialistischen Deutschland als geistiger Widerstand*, Tübingen 1959

³⁴ J. Woppowa, J. (2005). *Widerstand und Toleranz*. Stuttgart: Kohlhammer Verlag, op. cit., p. 261. I discuss W’s work in ZRGG 2006, No. 4, “Lebenslanges Lernen –am Ursprung aufgesucht”.

dimensions of learning, the concept of continuing learning leads to the everyday practice of religious living on the one hand, and on the other, it is needed to bring up to date the inherited rules of Halakah so that they respond to present-day challenges.”³⁵

We can conclude in summary that the content of lifelong learning must relate to current challenges, among which we may undoubtedly count suitability for employment in the sense of *employability*. At the same time, however, lifelong learning in the Jewish spirit also looks invariably to the social and sociocultural dimension, and to religious behaviours and attitudes. In other words, it combines formal, non-formal and informal learning content and skills.

We could provide examples to demonstrate that traditional and present-day perceptions of lifelong learning are not so far removed one from the other. This refers primarily to the subject-matter and content of lifelong learning, and to the principle of never being complete. Earlier authors did not of course enjoy the “refined” definitions that offer a greater degree of abstraction and precision. The Federal-Laender Education Committee (BLK), for example, offers the following definition: “Lifelong learning embraces all formal, non-formal and informal learning in different places of learning from early childhood to the phase of retirement. In this context learning is taken to mean the constructive processing of information and experience into knowledge, insights and skills.”³⁶ In this, something of the tradition we have discussed still shines through.

The modern discussion of “lifelong learning” begins, and here we close the circle by returning to the starting point of our reflections, with Cyril O. Houle, who both defines and describes lifelong learning in precise language and provides empirical evidence that adults are ready and motivated “to continue to learn”, and not only for practical purposes.

This impetus is then taken up in the 1970s by international and supra-national organisations, and a sequence becomes recognisable in which lifelong education/lifelong learning appears initially as a synonym for adult education, and then adopts the concept of a continuum of all stages and types of education, visualised in the image of an educational chain.

³⁵ Woppowa, J. (2005). *Zwischen Integration und Widerstand*. Stuttgart: Kohlhammer Verlag, op. cit., p. 27

³⁶ e.g. in: Strategie für Lebenslanges Lernen in der Bundesrepublik Deutschland, Materialien zur Bildungsplanung und Forschungsförderung, No. 115, Bonn 2004. See also the additional material in: DIE, Barbara Dietsche, Heinz H. Meyer, Literaturlauswertung Lebenslanges Lernen, im Auftrage der BLK, Bonn August 2004

This series of developments has often been described and need not be expressly repeated here.³⁷

Yet there is still no agreement among those concerned, or among decision-makers, notably the Land Ministers of Education, over how the continuum principle is to be applied in practice – in my view it is not so much a matter of building bridges between institutions as of being constantly aware of its many different aspects. As Fontane said, it is “a vast field”.

The purpose here has simply been to remind ourselves of a tradition which seems to have been forgotten and could have saved us many lengthy digressions if we had considered it more fully earlier. The words of Winston Churchill apply by analogy to education “Without tradition, art is like a flock of sheep without a shepherd.” Our act of remembrance is intended to be more than mere reverence.

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³⁷ I could list a number of descriptions, among which I shall mention only: J.H.Knoll, *Lebenslanges Lernen und internationale Bildungspolitik, Zur Genese eines Begriffs und dessen internationale Operationalisierungen*, in: Rainer Brödel (ed), *Lebenslanges Lernen – Lebensbegleitende Bildung*, Neuwied 1998, p. 35 – 51. I do not take into account there the development of the Jewish tradition which I discuss here.

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„Celoživotno učenje“ – novi termin za staru ideju? Potraga za istorijskim korenima

Apstrakt: Ovaj članak teži ispravljanju pretpostavke da je „celoživotno učenje“ izmišljeno od strane obrazovnih radnika sedamdesetih godina prošlog veka. Za razliku od većine autora koji knjigu E. Faure-a „Learning to be“ iz 1972. godine posmatraju kao početak „doživotnog učenja“, mi se vraćamo na Cyril O. Houle-a i njegovo impozantno delo iz 1961. godine. Delo „The Inquiring Mind“, je otac „celoživotnog učenja“ u modernom smislu. Cyril O. Houle je smatrao da koreni „celoživotnog učenja“ leže u drevnom judaizmu. Ovaj članak prati pravila i označava glavne faze ove genealogije: drevni judaizam kao zajednica koja uči, celoživotno učenje u Tori i Talmudu, Haskala kao veza sa obrazovnom praksom u Nemačkoj i na kraju, funkcija „kuća za podučavanje“ (Lehrhäuser) u Vajmarskoj Republici (Buber, Rosenzweig, Simon) kao mesta za celoživotno učenje u verskom i sekularnom smislu.

Ključne reči: Cyril O. Houle, celoživotno učenje, Judaizam.

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Blue Skies, Blue Collars: Learning Cultures in England

Abstract: An educational divide has characterized much of Britain's formal education system, and the cultures that derive from it, and adult educators have done, and continue to do much of their work to overcome it. This paper explores how that divide has shaped learning cultures in England.

Key words: learning culture, educational divide, adult educators.

Culture is ordinary: that is the first fact. Every human society has its own shape, its purposes, its own meanings. Every human society expresses these, in institutions, and in arts and learning. The making of a society is the finding of common meanings and directions, and its growth is an active debate and amendment, under the pressures of experience, contact, and discovery, writing themselves into the land.

Raymond Williams

Great Britain had in its heyday an education system fit for purpose for a society with two 'great' tasks. The first, evident mainly in the nineteenth century, was the administration of a large empire with a smattering of civil servants, and a few military officers backed in the main by locally recruited, or conscripted, soldiers, and the odd gun boat. The second, in the first half of the 20th century involved the oversight of Taylorist forms of mass production.

Both tasks involved a small number of people making decisions affecting very large numbers. For these people, education was expected to produce above all confident and assured decision takers; people with clarity about strategy; well read, with a clear sense of values; and people not easily intimidated. For the rest,

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education needed to instill a work ethic, a sense of discipline, enough skill to perform the tasks required of them, and not much more. For the few, education led the way to blue skies, a future where anything might be possible. For the rest, the prospect of a life of hard work, for, as the philosopher Bertrand Russell put it: Work is of two kinds: first, altering the position of matter at or near the earth's surface relatively to other such matter; second, telling other people to do so. The first kind is unpleasant and ill paid; the second is pleasant and highly paid.

This thinking shaped the development of learning cultures in Britain over centuries, but especially in England (since the Scots had a more democratic approach to education, and devolved responsibility for it, long before there was a Scottish Parliament). Elites enjoyed private education (public schools) and universities, where the learning was soaked up in the milieu as much as in the classroom. By contrast, there was a grudging extension of public education for the masses, accompanied always by concerns that if the poor should read and write they might get above themselves.

A further feature of this dichotomy has been the sharp distinction drawn between academic and vocational study – with the former privileged. It is a distinction that has not served Britain well. Since the industrial revolution respect for craft and craftsmanship, central to learning in a pre-industrial era, was now located outside the formal education system, as experienced skilled workers passed on their trades to apprentices. It was a system that sent most people into a narrow job –related direction, but at the same time awarded low status to vocational studies.

This educational divide between the few and the many was reflected in the 1944 Education Act, which shaped the institutional structures of post-war secondary education. This provided for grammar schools, where one in five of the population, selected by examination at the age of eleven, would be exposed to the humanities and sciences in much the same way as the public schools; and the other eighty percent would be prepared for the labour market, in secondary modern schools.

From the 1960s, with greater prosperity, the growth of the middle class, and as the nature of work changed, too, there was a steady move away from this binary approach to education – to create comprehensive schools. At the same time, higher education expanded – from just 6 percent of young people attending university in the late 1960s to 43% today.

Whilst for the products of grammar schools, then, education offered a route to social mobility for the clever children of the working class, for the main bulk of the population it confirmed the existing class order of things.

It is against that background that adult education has developed in the UK. Of course education is not only shaped by the state or by its most powerful citizens. At the same time there was a consistent strain of radical opposition to the prevailing wind, a determination among people to assert that mass education for all is the way to a just and humane society. This strand of adult education, organized by freely associating groups of adults, learning together to give dignity and richness to their lives is perhaps the bedrock of what the Workers' Educational Association used to call 'this great movement of ours.'

The heated debates about the future organisation of British society generated by radical groups such as the Levellers in the seventeenth century, by the coffee house debates of the eighteenth century, and by the temperance movement, each led to new forms of association, and were developed and used widely to enrich people's learning and their quality of life. Through the mutual improvement societies and independent lending libraries of the nineteenth century, through the women's movement and the green alliances of more recent times, people have come to new forms of organisation, new subjects for learning and refreshed relations between learning and democratic action.

Often their energies have led to the establishment of structured organisations. Trades Unions, co-operative societies, women's institutes and non-conformist religious groups were formed first for people to address challenges their members shared in common, and grew to offer a wide range of opportunities for learning and development for the communities they served.

The breadth and vibrancy of voluntary and community organisations are testament to the resilience of that tradition. All play a role in offering practical learning in democracy, as well as opportunities for people to develop skills, knowledge understanding and capacity, and to contribute to the wider welfare of society.

Raymond Williams, the cultural critic and adult educator, wrote that at times of social change, people came together to learn to understand change, to adapt to it, and to shape it. This voluntary movement created a culture of learning where the desire to change the world was inextricably linked to the desire to learn – exactly the connection in another continent, and more recently, Paulo Freire meant when he spoke of adult literacy as a tool for reading the world as well as just reading words, important as that is.

A second strand of provision for the education of adults developed at the end of the nineteenth century and flowered up to the end of the twentieth in the university extension movement, created by socially conscious academics who wanted to bring the fruits of university scholarship, and the rigour of serious enquiry to working people previously denied access to them. R. H. Tawney, the

economic historian, played a key role in the development and spread of university tutorial classes. His approach to teaching working class students, which was radical in its day, was described by an observer, Mrs. Stocks: He talked to them as man to man, neither claiming authority nor asking for unquestioned agreement. But as he talked, the breadth and quality of his mind and the meticulous accuracy of his scholarship reflected itself in the work of his students and established the standard of their thought. (Stocks, 39)

Just as well, given the confidence of students, like J. M. Mactavish, an early member of the Workers' Educational Association, and a shipwright from Portsmouth. At a conference in Oxford in 1907, called to discuss 'What Oxford can do for Workpeople', Mactavish argued: I am not here as a suppliant for my class. I decline to sit at the rich man's gate praying for crumbs. I claim for my class all the best of all that Oxford has to give. (Mansbridge in Kelly, 227)

A third strand of adult education activity developed along with the expansion of local government. This saw the consolidation of a national system of public libraries and museums in many towns and cities. It saw too the development of classes in dressmaking, boot repair, cookery and physical education as people sought to stretch tight budgets. In a 1926 report of the Board of Education, explained that given how little access to learning many people had, the challenge was to find 'any common interest which could serve as a basis, or even a starting point, for any educational effort.' The result was a flowering of courses in physical education, pigeon fancying, horticulture, amateur wireless (what we now call radio), and science. This was a strand of provision that grew impressively in the period following the Second World War, as a more affluent population sought opportunities for structured leisure time activity, until the resurgence of utilitarian policies cut back sharply on courses where adults might learn for the joy of it.

There was, in addition, night school – where people gained the qualifications they had missed out on at school. Night school complemented the tradition of apprenticeship training, where young people gained vocational skills in the workplace itself. At specialist institutions adults pursued systematic courses in order to consolidate their opportunities in the world of work. Over the years, the mainly vocational institutions that began as night schools became, further education colleges, or, for some, successively, Colleges of Advanced Technology, polytechnics and now universities, bringing with them a commitment to making access to learning for adults possible through the organisation of part-time and modular study.

In a famous essay Raymond Williams identifies three broad groups of educators in Britain. The first, Old Humanists think education is to do with values rather than practical applications. Alas they think education of this sort should

be limited to an elite. Second, the Industrial Trainers 'believe that the purpose of education is to fit people to earn their living'; they believe 'the most persuasive argument for the extension of education has still to be put in terms not of values but of competitive economies' and that it is best done young. (Williams, in McIlroy/Westwood, 227)

Neither the trainers nor the Old Humanists sees a significant role for adult learning. His third group, the Public Educators, say 'with Carlyle, that it is the first duty of government to see that the people can think', and thereby shape society. (Williams in McIlroy/Westwood 228)

Two groups believe this, Williams argues. The first believe the task is to bring culture to the poor; the second, to work alongside learners to shape a programme of studies that makes sense to them, starts from their experiences and addresses their own concerns. There was a strong commitment in the second of these groups to negotiate the curriculum with learners. This led to richly diverse learning experiences. All these groups are recognizable today among educators and policy makers.

By the end of the 1960s, it became clear that the mix of adult education provision on offer attracted learners who had already had the benefit of extended initial education. Working class people, and especially working class men, took little part. But there were significant other minorities excluded from provision – among them people with poor basic skills, people with disabilities and learning difficulties, migrants, offenders.

In 1975, a major national campaign to teach adults to read and write was launched, and given a huge boost by the decision of the BBC to put out 24 weeks of prime time television programmes in support of the campaign's aim to teach literacy and numeracy. The literacy campaign made a determined effort to make learners' experiences central to the process. The only materials then available were aimed at small children, so students dictated and edited powerful stories, which were published and used as the materials to generate new work. The literacy campaign linked with a worker writers' movement, determined to ensure that working people's histories and ideas were as freely available as those of the more frequently published sections of society.

A comparable initiative followed, offering English as a Second Language (now English for Speakers of Other Languages or ESOL) classes to adults who had migrated to Britain to take up jobs. In addition to the language components of these studies, ESOL classes offered the chance to make sense of life in Britain, how to get benefits, where to go to register with a doctor, and so on. But they also became the fulcrum for developing an understanding of what it meant for all of us to live in a multi-cultural, linguistically and culturally diverse society.

There was a major move to engage with people whose initial experience of schools made them believe that educational institutions were not for them. Outreach workers started groups in pubs and clubs, wherever people were comfortable to learn.

The rise of second generation feminism had an impact on curriculum and process alike, challenging both established pedagogy and epistemology, and providing a graphic example of how easy it is to write human effort and achievement out of our common narratives. There was an impact, too, with the development of the Access movement, which offered second chances to pursue higher education to people who missed out the first time round. For that movement to succeed, it was necessary to provide some order among the rich anarchy of adult learning opportunities in place. The Open College network, which was started by practitioners, developed a mechanism for learners to gain credit for their studies, long before there was official interest in credit accumulation and transfer.

Trade unions renewed interest in learning – first through shop steward and health and safety courses; then through more general educational initiatives. More recently unions have developed the role of union learning representatives, (now 20,000 strong), able to act as brokers, offering information and advice to their colleagues on re-engaging with learning.

Broadcasting has been a major influence on adult learning since the foundation of the BBC in the 1920s. A core part of its mission was to educate – and as a result educational and educative programming have been able to garner prime time slots – for programmes as varied as *The Blue Planet* (a study of oceanography) and *The People's War*, which generated an online archive of people's memories and reflections of life in the 1940s that engaged tens of thousands of participants. With the growth of new media, broadcasters have invented new forms of association and of promotion.

The single most innovative initiative of the post-war years, the creation of the Open University, which made effective use of television from the beginning. The Open University's influence on the learning culture of the country cannot be over-estimated. Since its inception, more than two million British adults have studied with the institution. In addition, through its link with broadcasting (and more recently in the use of the web and mobile technology) – another two million people a week were able to eavesdrop on the broadcast programmes integral to its studies. The Open University pioneered high quality distance learning materials, produced collectively by teams of experts. It gave a powerful impetus to the creation of modular, credit based studies, and showed conclusively that adult part-time study, undertaken at a distance, could be as rigorous and challenging as any full-time undergraduate programme. Its students are fiercely proud of the

institution, and when provoked are skilled at making their voices heard in political debates.

If much of the development since the 1960s re-asserted the link between adult education and social justice, the effect of policy, funding and institutional changes since the early 1990s have, not always intentionally, often served to weaken those links, and to create new divides.

The 1992 Further and Higher Education Act separated adult education into well-funded provision leading to nationally recognised qualifications (or credits towards them), and much-less well funded, locally organised uncertificated provision. This led to many providers scrambling to turn French or art classes into certificated provision, to secure better and more secure funding. This eroded the possibility of students negotiating the curriculum.

The new funding arrangements were backed by external inspection, to ensure that all providers receiving state money operated to a common standard. This was a welcome enough aim, but had the effect of taking agency away from teachers and learners, and locating it in the dialogue between institutional managers, inspectors and funders. The net result was a weakening of links between structured adult education and the less formal learning activities of voluntary movements. Despite real gains for adults with disabilities, during these years, and despite significant expansion in investment overall, there was a reduction in innovation, as providers were steered more and more towards the achievement of national targets designed to secure a more skilled workforce.

In the late 1990s this process was to an extent reversed with the new Labour Government, which launched a breathtaking variety of new initiatives to kick start a lifelong learning culture. Among them was the creation of a University for Industry (now 'learndirect'), the latest in a number of attempts to parallel the achievements of the Open University by creating an e-learning based institution offering less advanced studies. The government funded innovative initiatives to widen access and participation; and it launched Individual Learning accounts, which put money into the pockets of learners willing to take up learning, until fraudulent private providers found a way to exploit the budget, and put an end to a successful innovation.

However, there is always a pendulum in public policy affecting adult learners, between a desire to make learning accessible to all, and a utilitarian anxiety, that with not enough money to go round, there should be clear priority given to provision that directly benefits the labour market. After 1993, whilst the snowstorm of initiatives continued, they were all now focused on improving skills in the workplace, as Skills Strategy after Skills Strategy was published. Money was

diverted from adult education open to anyone to provision organized with employers on employers' premises.

The catch was that such provision needed to lead to a particular nationally recognised qualification years whether or not it met employers' or workers' needs. There were, of course, successes – notably in involving more people over the age of 45 in learning. But there were widespread weaknesses – public money displaced money employers previously spent themselves; there was too little money to do a rigorous job in many circumstances.

For providers who saw a role for adult learning beyond that envisaged by Williams' Industrial Trainers, these years have involved ingenuity in bending budgets to more generous purposes. For people outside the education industry there has been a re-assertion of the role learning can play in autonomous civil society organisations.

More recently there has been a resurgence of interest in the voluntary and community sector, and in informal learning, with new confidence in libraries and museums that they have a key contribution to make to lifelong learning, and the new government, elected in May believes that 'philistinism is bad economics' and that adult learning of all sorts matters. The pendulum is swinging again – if only modestly at a time of major cuts in funding.

Where does this leave learning cultures in England? Well, NIACE's regular annual surveys of participation show that Helena Kennedy's 1997 judgment, 'If at first you don't succeed, you don't succeed', is true still for far too many people. Almost everyone recognises that learning can make a positive difference to your life, your job, your children's chances, and to your health, physical and mental, but still a quarter of the adult population think it is not for the likes of me. New technologies enrich the lives of active learners – with 2 million regular users of material on iTunes U, and a self-help culture on YouTube where you can learn anything from guitars to gardening. If you work for a large firm, or in a field involving technological change, you will surely get more chances to learn at work than your parents had. But public spaces for understanding change, adapting to it and shaping it have shrunk over this decade. That kind of adult education does go on, especially informally, for example in the sustainability movement, but in publicly funded work it feels more like guerrilla activity than a core dimension of adult education in a democratic and diverse society.

So, whilst the picture is a complex one there are still too many ways in which for the educationally privileged the sky is the limit, whilst for the educationally excluded opportunities are too often focused only on employability. It is, as ever, the task of adult educators to narrow the gap between the two.

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Plavo nebo, plavi radnički mantil: kulture učenja u Engleskoj

Apstrakt: Veliki deo britanskog obrazovnog sistema karakteriše obrazovni jaz. Kulture koje iz njega proizilaze kao i nastavnici u obrazovanju odraslih su već učinili mnogo toga i nastaviće da posvećuju deo svog rada njihovom prevazilaženju. Ovaj rad istražuje kako su podele oblikovale kulture učenja u Engleskoj.

Ključne reči: kultura učenja, obrazovni jaz, nastavnici u obrazovanju odraslih.

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New Ways in Andragogy: Regional Andragogy

Abstract: The starting point of the study is that andragogy has evolved into an important and subtle subsystem of pedagogy, education and public culture which can be and must be examined from a scientific point of view from several aspects and as a consequence, from a regional one as well. The aim of the study is to point to the presence, importance and development possibilities of research of regional approach in andragogy. According to this – in the first place in the scientific special literature of Hungary after the political restructuring and on the bases of different kinds of researches – it outlines the main directions of research of regional aspect, it analyses the interdisciplinary and inter-trade linking points in connection with it. It would like to give an answer if the ways of research and results could be an adequate basis for the emergence of a regional andragogy which can be defined as a special field within andragogy.

Key words: regional andragogy, regional educational research, cultural research.

Introduction

According to the scientific trends adult education research developed in the expanding and interdependent interaction with other scientific fields, too. Besides the traditional linking fields – pedagogy, psychology, philology, sociology, economy, labour sciences, artistic discipline, history etc. – there was a natural need for the inclusion of the aspects, methods and results of spatial sciences into adult education research. The study interprets education at a mature age from the point of view of andragogy and does not reduce it to adult education. The relationship with public education and public culture, the question of the integration or disintegration of the two fields concerned cause a lot of problems and disorders in the research of andragogy and in the practice of adult education. It obviously

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comes from the extremely variegated nature of adult education forms and places. It has been an actual question whether andragogy is of disperse nature or it can be interpreted, examined and operated as a coherent system. Andragogy clearly undertakes the examination of formal education, training, in the case of informal education and learning the situation is less clear-cut. Adult education research leaves the fields of formal and informal learning connected to public education institutions, organizations, cultural and community activities in the hands of cultural and educational research. The application of open coordination approach and method are indispensable in regional research, regional management, planning and the highly diversified system of andragogy requires this approach as well. The scope borders do not make possible the examination of the scientific and professional fields which regional andragogy can build on (regional science, education geography, regional and settlement development etc.). It touches upon though those main trends of teaching, culture and education research connected to andragogy directly in which adult learning and/or regional view are present.

The sources of the forming regional andragogy

The main trends of regional educational research

The regional based examinations have become a characteristic part of education research in Hungary since the 1970s. The typical motivation of these researches are the analyses of the new regional models of education organization, planning, the hoisting of regional approach into education development. The view, terminology, methods, results of social geography have been built into education research. The regional differences of the lack of education, education, qualification, culture have been examined as well as the regional models of the school system, the reasons of regional inequality. They threw light on problems, such as inadequacy of the district, regional and settlement data base, which have been up-to-date problems nowadays as well and they also cast light on how adequate the typology of settlement geography and the indicators serving as bases for it and the administrative configuration are for educational research. The spatial structure of the different levels of school system, the school zones, the effects of school zones, the perspectives of the farm and village schools, the ones of the higher education institutions of the middle-sized towns have also been examined. An attempt has been made to elaborate a culture based regional typology (Kozma, 1987). They wanted to reach the reduction of the horizontal – regional – inequalities of the society with the help of a kind of social oecological view, the

changing of the environmental (educational) conditions and they drew up the demand for the complex analysis of education indicators with social-economic indicators (Forray, 1993). The supply of institutional culture transmission, employment, regional mobility, demographic behaviour, vocational training and trade structure, accessibility, job possibilities, the initiation of social and political indicators are the basic elements of regional research of education today as well. In spite of the oecological view – because of the unformed nature of the adult education system – the andragogical approach has not been present characteristically. The political restructuring, then the joining of the European Union have placed the research of education into new political, economic, social, regional dimensions. On one hand the new research topics, approaches, preferences examined the former points of view in more sensitive ways in the changing space, on the other hand new research points of view and methods appeared. The examination of the relatedness of the regional characteristics of education, (regional) human resource development and (regional) competitiveness has become more stressed (Balázs, 2005). The regional researches beyond the borders of the Carpatian basin have been intensified. In the 90s Tamás Kozma and his colleagues drafted the hypothesis in connection with the examination of the regional spread of third degree trainings that in the future the expansion of the fourth degree training (adult education) would be the main area of the expansion of education (Kozma, 2000). The examination of the schools of the small settlements got a new topicality after the political restructuring. The role of school was examined as a factor which influenced migration, forms of the local society, organized the community and helped life-long learning (Imre, 2004). The regional approach appears in education research concerning the size of the settlements, their wealth and their connection to educational inequalities from the point of view of commutation, regional segregation, access to quality education, ethnic segregation, student achievements and several others (Keller & Mártonfi, 2006). The subsidy policy of the EU strengthened the decentralization of educational management and the region-specific planning and resulted in a kind of sectoral and intersectoral cooperation pressure. The examination of public and higher education system is being done clearly in the way of looking at life-long learning in education research. The researches going on in the Education Research and Development Institute in 2010 – like the participation in the examination of adult competence (OECD PIAAC), the research of adults' independent learning, learning besides work – also support the more and more characteristic appearance of adult education (and adult education out of the school system) within education.

The regional approach in cultural and educational research

While adult education and mainly adult training are interpreted in the education/training system, too, andragogy is an integrated part of the cultural sphere as well, the connection between the two systems is mutual and multidimensional. Until recently andragogical (and pedagogical) theory has paid little attention to the community and self-study, cultural processes beyond and out of organized education. Educational and cultural theory have examined and examine today as well – first of all not in educational theory respect - the educational aspects of the cultural sphere, the questions of education and culture out of and beyond education and training (Lada, 2006). The cultural sector is mainly the field of the adults' informal and formal education, the cultural institutions are connected to andragogy through their public cultural roles which back the adults' public education activities.

The main fields of cultural research in the 90s were the examination of the features and utilization of culture consumption, the evolution of cultural needs, the traditional cultural activities, reading and TV watching habits, the usage of the internet, taking part in creative groups, cultural supply – their institutions and services. The comparison of cultural institutions and services, the cultural activities according to settlement types connected to them got into the centre of interest mainly from the point of view of equal chances. According to the examinations those who live in households with lower income and those who are low-qualified are usually less active in cultural sense, in spite of this in the first decade after the political restructuring in Hungary mainly the settlement inequalities influenced a lot the chance of access to cultural services (Bernát, 2005).

The complex research about the cultural state of Hungary done in the first half of the new millenium (similarly to the former country-wide state surveys) seems to be an important source of information from theoretical and developmental points of view and outlines important conclusions. During a more differentiated examination of cultural consumption it highlights the importance of educational level and age and emphasizes the increase of education on a social level, the creation of the needs and possibilities for self-education in the cultural capacity. Although in a refined way, but it points to settlement determination, the importance and responsibility of the local level (Dudás & Hunyadi, 2005).

The analysis of the different cultural dimensions reflects the appearance of the regional points of view in the approach of the relations between the capital, county seat, other towns (under 10000 inhabitants, between 10000-100000 inhabitants), village (under 2000 inhabitants, between 2-5000 inhabitants) and traditionally between Budapest and the country. Among the research points of view

the age group characteristics have been taken into consideration in the respect of knowledge, experience, way of living, the change and difference of the need for learning. The researchers mention among the most important tasks to decrease the residential environmental disadvantages and to help the development of personal abilities and skills. As the consequence of the expansion of cultural and entertainment supply they stress the importance of the personal, selection and orientation skills, the density and quality of the personal connection network as decisive chance increasing factors. The results of the research show a correlation between cultural reception and knowledge possession. In Hungary, where half of the society consume 90% of cultural supply, where 70-80% of the adult population are not able to understand complex texts, adult education must be of vital importance in the liquidation of cultural discrimination from the point of view of the subsequent supplement of cultural and network capital, the possession and development of knowledge capital, the labour market integration. The research stresses the different functions of adult learning, like community development, the increase of self-confidence and self-esteem, social (re)integration. They attribute the same importance to civil organizations, hobby circles, clubs, workshops, helping communities in adult learning as to formal institutions (Hunyadi, 2005).

From the point of view of social chances, qualification has a more determining role in Hungary – compared to the western countries – besides the regional and local innovation characteristics, educational, cultural institutional supply, settlement type, the cultural sensitivity of the self-governments and the traditions. It derives, besides other factors, from the building up, functional and effectiveness deficiencies of the self-educational, correctional, remedial nature of the adult education institution system. In the middle of the 90s the economic wester-eastern slope could not be projected onto the state of cultural institutions and public education clearly, the cultural indicators of the Great Hungarian Plain were better than its economical ones. At the beginning of the 2000s the situation was more differentiated and the regional, settlement differences increased. Some big and small towns had better complex development indicators in spite of the weaknesses of economic indicators. The basis of their competitiveness is their good innovation, cultural institutional system, their well-qualified elite, cultural traditions, their sense of identity, their local patriots – and generally their better human resource supply. All these support the opinion of the experts of the cultural sphere that regional and settlement development is cultural development to a great extent as well (Agárdi, 2005).

A research terminated in 2009 represents the infiltration of regional approach into the researches of public culture, which mapped the institutional system in settlements with a population under 30000 inhabitants. It wanted to form

a notion of institutional and functional dismemberment and concentration on the basis of the institutional and functional supply of the settlements and the regional cooperation of the institutions, and according to the aim of the researchers, it wanted to give scientific foundations of the institutional and functional integration efforts of the settlements/regions. According to the research, depending on the characteristic features of the certain regions, settlements (disadvantageous situation, suburbanization level, urban rank, settlement size, social-demographic composition etc.) the factors explaining the level of supply can be other ones (Talata-Dudás, 2009).

The research aiming at the professional foundation of culture-based town development were extended to the cities (pole towns) as well in the 2000s. Their starting point is – logically – that the development of intellectual infrastructure is as important as the development of the physical one. The main topics of the research – the cultural, educational, creative, modernizing, democratizing, habitable town – reflect an integrated view which interprets culture as a development source of energy, a set of abilities and a framework of cooperation (Hunyadi, Kiss & Dénes, 2006).

The main directions of adult education regional researches

The andragogical researches developed differentiated and parallel in several respects with teaching, cultural and educational research from the second half of the 20th century, naturally a bit in a consecutive position due to the several hundred years' of „drawback”. But at the beginning of the 21st century the adult education researches compete with pedagogical researches concerning their volume, sensitivity, quality and innovation role.

Education is an organic unit, among the subsystems of which – public education, vocational training, higher education – adult education has become an important part of the integrated system. Adult education though – concerning its functions, clients, organizations, teachers – differs to a great extent from the other subsystems of education and that is why it is difficult to integrate it into the education system (Halász, 2001). Besides this, concerning its volume, the centre of interest of learning activities in Hungary has shifted more and more onto the adult age out of and beyond the formal school system, learning forms and places differentiated extraordinarily – they are connected mainly not to the school but to the schooling-age. Consequently, both the basic characteristic features of adult education and the trends of learning helped andragogy to become a definable system. Life-long learning, the paradigm of education based society

and economy resulted in the overestimation of adult education research in the system of organized, regular, formal non-formal and informal learning in our country, too. The changes gave extraordinarily intensive impetus to the extension and development of adult education functions, institutional system, places, contents and forms. The research fields are strongly influenced by the fact that educational, employment and economy policy prefer the economic role of adult education and from among its social functions the ones which are connected to labour market. They support those kinds of adult vocational trainings in and out of the school system which establish the increase of competitiveness, increase employment, decrease structural unemployment from the point of view of the role of economy, and from the point of view of the relief of social tension those trainings, institutions, educational fields and forms which play a role in the labour market re-integration of socially disadvantageous and unemployed people. The andragogical researches are directed towards the regional based approaches mainly by planning, organizational, successfulness, efficiency – thus practical – questions and the regional view appears only tangentially and secondarily in the theoretical researches. The motivations of the applied researches are helped by the convergence of the institutional, financial and planning systems of educational, cultural and employment policy with the subsidy support principles and practice of the European Union, with the establishment of the regional structure of the Union in Hungary.

There was an attempt to examine the adult education system in a complex way and to make a map-like survey from the 90s. The involvement of the JPTE FEEFI (Janus Pannonius University of Pécs, Adult Education Institute), The International Educational Institute of the German People' Academy Alliance, the Education Research Institute, the Hungarian Cultural Institute and other institutions reflected the andragogical view interpreting broadly the places and forms of adult learning. According to this, the data and the statements of the cultural survey of Hungary in 1996 were regarded as important adult education sources. The research included the survey of the county seats and the districts of the capital (Bajusz, Hinzen & Bodnár, 1998). They examined the relations between the size of the town and the supply market, the differences of the schooling – cultural – adult education map, the ratio of learners/inhabitants, the legal forms of the educational institutions, the entrepreneurs and the civil people, the qualification of the teachers, the forms of training and several other factors (Koltai, 2003). They also set an aim to survey the other towns, counties and small regions later, too. Although adult education statistics has developed a lot since then, unfortunately andragogy profession has not been able to make a country-wide survey which would aim at completeness referring at least to the generally applied set-

tlement and space typology. A few years later a kind of country-wide map was made, too about a narrower segment of the adult education system using the tools of space informatics. The correlations between employment data and adult education supply were examined on a small regional level pointing to county and regional correlations, too. The aim of the statistical analysis was to show the white spots of supply, to serve as a basis for the survey of adult education demand (for this it could have served only as a contribution). The company seat dispersion of registered adult education institutions, the OKJ (registered) trainings, the accredited institutions, the number of vocational training schools were analysed and compared on small regional level (Szentiványi & Szentiványi, 2006).

Geography based local and regional works also dealt with the connections of employment, education and adult education. Adult education appears in these analyses characteristically as an educational, training segment providing correction for the deficiencies of the educational and vocational training system, decreasing unemployment and helping employment (Garai, 2007). The strengthening of the bottom up attitude of economy development brought about the examination of the local economy developer role of adult education. The satisfaction of the general and special educational needs of multifunctional employment embedded into the local society, the attachment of adult learning to concrete space and time, the development of the local system of adult education could be important segments of future research trends (Tóth, 2007). The realization choices of the idea of the learning society also motivated the local examination of the educational and cultural level of adult village population, the willingness to take part in learning, motivation, activity and values, etc (Zsumbera, 2001).

Characteristically the role of adult education, its functions, forms, its fruitfulness and effectiveness questions are examined in the regional analysis of the educational system of adult education connected to public education and the regional approach (region, county, small region) serves as a kind of developmental framework. They usually set out from the statistical data, specimen generally used in regional researches – demography, employment, unemployment, schooling, settlement structure. The regional approach appears in some researches in the accessibility of adult education institutions in connection with the question of the regional structural inadequacy of trade/job/qualification, in the examination of the adult education school districts and in regional organizational coordination circles, too (Bajuszt, 2005).

To examine the regional drawbacks within the framework of the examination of disadvantageous situation is an emphasized direction in adult education researches. Usually the examined regional borders are the regional operation of the Regional Training Centres, the districts of the county labour organization

and its branches in the out-of-school labour market adult education researches. A country-wide research examined the number of accepted and recommended trainings, the labour demand of the region and the participation in the training, the characteristic feature of the effectiveness of the training according to residence (a settlement at a disadvantage, depressive region) (Halmos, 2005).

The most neglected segment of the adult education institutional system is the non-profit sphere even from the point of view of research. State adult education operates trainings and institutions providing educational services with definite content for the reaching of aims preferred by the state for certain target groups. The for-profit trainers adjust their educational structure to demand/supply and choose premises, operation district accordingly. The non-profit and particularly the civil organizations organized from the bottom make the system really diverse. This sector, which basically does not have entrepreneurial attitude, represents the values and claims of diverse groups and is not recorded or administered properly, can be researched with scientific claim with difficulty. The great number of non-profit specialized literature and researches contradict this only apparently. The research of the general questions of educational non-profits – and thus their regional examination – can only be discovered sporadically within the sector, usually as the „appendix” of the analysis of the sector. Nevertheless, a research has been made in Hungary concerning the adult education civil/non-profit organizations with a summarizing purpose (Arapovics, 2007). This research, despite its limits, gave a subtle comprehensive analysis about the organizations. The regional points of view were also considered when the organizational circle examined was chosen (capital, town, settlement). The registered adult education organizations, and within them the number, ratio of non-profits, were analysed according to regions. Although on a surface level only, but the data were compared with the economic development of the regions and the regional indexes of learning participation were used on the basis of KSH (Central Office of Statistics) data.

As adult education has had its own legal, regulation, guiding, professional, institutional frameworks by now, the effective, successful and „just” operation of this sector, which is complex and covers several branches, demands multi-dimensional planning. It is particularly more valid for adult education than other educational branches that it can only be planned well on a regional (district) basis. The development of the decentralized educational system, the planning of suitable subsidization and training supply requires deep regional survey. Adult education planning runs into serious difficulties even on this level. During planning emphasis is usually laid on the examination of accredited adult education institutions and trade schools. The most characteristic indexes, which adult education literature indicates as the starting factors of planning are the number of

institutions compared to the number of employed and unemployed people, the regional characteristics of their premises, the regional adequacy of the educational structure and the employment structure and the trends of labour market processes (Szép, & Vámosi, 2007). We can find definitely region-based works in connection with adult education planning questions. The research of the National Adult Education Institute done in the spirit of open coordination examined the connection and harmonization of the regional and the educational/training plans focusing on small regions at a disadvantage. They analysed how and to what extent adult education was present in them, how the regional and sectorial plans influenced the formation of adult education supply, participation and employment after training. They pointed to the deficiencies of the planning, those factors which hindered the realization of the plans. The predominance of the role of outer factors, the inadequacy of inner human resource, of connection and social capital, the lack of institution supply, the hindrances of knowledge centre accessibility, the passivity of the population, their disappointment, their negative attitude to learning, the predominance of state adult education, institutions over the private entrepreneurs' and non-profit training institutions are factors which force the regions at a disadvantage into a spiral moving continuously downwards. The regional, small regional plans, in which adult education is present on a general level at most, do not give an answer to them. During planning new answer should be given to new questions according to new points of view, the possibilities of knowledge production should be looked for besides knowledge utilization (Benke, 2005).

In Hungary the research of the concept of learning region, learning town built on international experience represents the connection between adult education and regional development. By now the learning region concept has been representing an extraordinarily complex, collective, dynamic learning process since its economy developing and competitiveness increasing root. The learning region is actually an organizational framework confined within spatial limits, which provides suitable circumstances for continuous learning in the interest of the economic, social development of the region. It aims at the development of infrastructure besides/instead of infrastructure, includes problem-solving learning, the development of interpersonal competencies and results in the development of the representation of interests and of new learning culture in general. It presumes the organizational and inter-organizational network learning, the development of innovation systems on settlement and regional levels, where the learning of the participants is connected mainly to their regional roles. In this cooperative network the educational institutions (the universities in the first place), cultural institutions of the region, as well as the K+F institutions, the enterprises, the

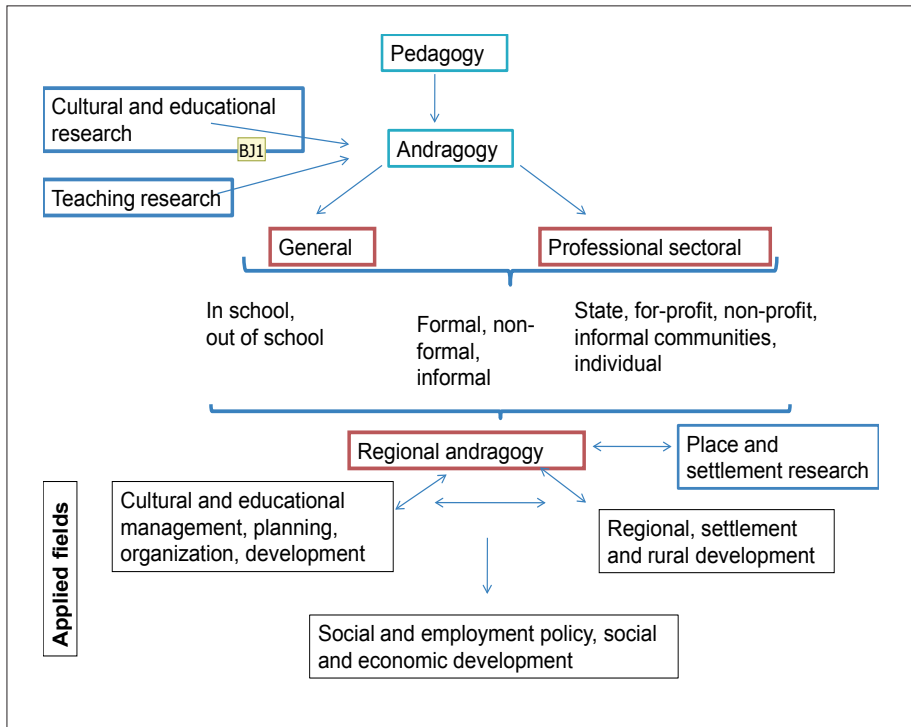
chambers, the labour organization, the civils, the self-governments take part, so it displays the political – economic – social network building at the same time (Németh, 2006). The adaptation and practical realization of the theory of learning region in Hungary can mean an exceptionally important direction of regional andragogical researches in the future.

Conclusions – the positioning of regional andragogy in andragogy

In theoretical andragogical literature we can meet most often today the scientific-theoretical questions of andragogy, researches which support the justification of its importance, significance. These are didactic questions, they bring into focus the characteristic features of adult teaching and learning, their process, their participants, the activity of the participants and the factors influencing them. Besides this several theoretical works mention the importance of the consideration of regional factors in the development of adult education and we can meet researches of andragogical attitude (and not ones of adult education in a narrow sense). In applied researches the definitely region-based approaches are present usually in the case of regional analyses. The educational, cultural and andragogical trends outlined in the study, even if they do not verify but confirm the hypothesis of the reason for the existence of regional andragogy and they call the attention to the necessity of its elaboration with scientific care. The condition of scientific-based regional andragogy is to build up the comprehensive regional examination aspects, methods of the general, sectoral approaches in andragogy.

The place and connection system of regional andragogy in andragogy

The elaboration of regional andragogy requires a complex view and approach. Its condition is to build the andragogical attitude in a more stressed way into adult education researches. The examination of the forms, places and possibilities of organized adult education connected to the cultural sphere put one of the important segments of educational research in issue in andragogical research in a more characteristic way. The sensitive examination of the adult population must be applied from an andragogical point of view utilizing the results and methods of cultural and educational research besides the traditional connection with educational research.



Own drafting

The general research fields of andragogy – the characteristics of adult learning, its forms, motivations, the teaching of adults, its methods etc. – can be examined in connection with regional-environmental factors, effects. The research of sectoral-based andragogy, the system of sectoral andragogy are being formed today (eg. social andragogy) and it is easy to realize that sectoral andragogies and sectoral adult education can be examined on a regional base as well. Maybe the most important social functions of adult education are the dimensions which reduce inequalities, develop economy and employment. The development, planning, operation of both fields can be done successfully, effectively and justly in the context of regional characteristics.

The research field of regional andragogy is extremely complex, the most important ones of which can be:

- the determination of the used and applied regional data, indicators, indexes,
- the methodology of regional researches,

- regional/settlement data collection, data base, statistics,
- the institutional system,
- the training,
- the regional examination of training forms and sectors,
- regional analyses of adult education economy,
- regional planning,
- the system of regional regulation,
- regional need and demand survey,
- complex regional and local researches, surveys – learning regions and settlements,
- comparative regional adult education researches.

Thus regional andragogy is interpreted not as a sector of andragogy in this respect but as a new one – in coordination with the general and sectoral approaches – , as an attitude which can be applied for the whole system and to which a particular target system, methodology can be attached.

Regional andragogy – according to a possible starting proposal – examines the general factors of adult learning, its questions concerning content, its forms, institutional system, sectors, places, levels, managerial, planning, organizational and operational systems in connection with the regional characteristics and processes. It deals with the factors of regional characteristics influencing andragogy and with the role of adult education in the regional allocation of resources, in the reduction of regional inequalities. It fortifies the position of andragogy in scientific public opinion, politics and society, it contributes to the decisions of the government and sectors. The importance of interdisciplinary and interprofessional cooperations have become stronger and stronger in scientific and social researches, which involves the overestimation of the borderlines. Regional andragogy can be regarded as a borderline like that, which is naturally connected to place and settlement research in the first place, it must build on their views, results, methods. Regional andragogy can play the role of a kind of scientific, professional „bridge”. Its applied research connections can be grasped the most directly in relation to educational, cultural development, planning, management and regional, settlement and rural development and it can provide ammunition mainly for human resource, employment, economic and social political decisions.

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Novi putevi u andragogiji: regionalna andragogija

Apstrakt: Polazna tačka ove studije je da je andragogija evoluirala u važan i suptilan pod-sistem pedagogije, obrazovanja i javne kulture koja može i mora biti ispitivana sa naučne tačke gledišta i iz različitih aspekata pa kao posledica toga, mora biti ispitivana i iz regionalne perspektive. Cilj ovog rada jeste da ukaže na prisustvo, značaj i razvoj mogućnosti za istraživanje regionalnog pristupa andragogiji. Na prvom mestu u specifičnoj naučnoj literaturi Mađarske, posle političkog restrukturiranja i na osnovama različitih istraživanja – ona uokviruje glavne pravce istraživanja regionalnog aspekta, analizira interdisciplinarne i međutrgovinske dodirne tačke sa kojima je u vezi. Ona želi da dá odgovor na pitanje da li načini istraživanja i rezultati mogu biti adekvatna baza za nastanak regionalne andragogije koja se može definisati kao posebno polje unutar same andragogije.

Ključne reči: regionalna andragogija, regionalno istraživanje u obrazovanju, istraživanje kulture.

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Politika doživotnog učenja u Evropi: EU, Škotska, Danska i Srbija²

Apstrakt: Cilj rada je da prikaže sličnosti i razlike ciljeva strategija doživotnog učenja i obrazovanja odraslih Škotske, Danske i Srbije u kontekstu Evropske unije. Nova direkcija komparativnih istraživanja ide u pravcu višeslojnih jedinica analize koje uključuju globalni, internacionalni i mikronivo poređenja te je stoga akcenat stavljen na hronološku analizu Evropske unije kao supranacionalnog kreatora obrazovnih politika. Rezultati analize su pokazali da kada se posmatra politika kao diskurs, a ne kao praksa, ciljevi strategija su prilično ujednačeni i usaglašeni sa dokumentima EU, koji se odnose na doživotno učenje. Značajne razlike u ciljevima uglavnom proizilaze, pored socio-ekonomskih karakteristika država i njihovog odnosa prema EU, iz različitih modela kreiranja obrazovnih politika i upravljanja.

Ključne reči: strategije doživotnog učenja, Evropska unija, modeli kreiranja politika.

Uvod

Doživotno učenje je koncept koji poslednjih 15 godina predstavlja osnovni pristup u kreiranju obrazovnih politika evropskih zemalja, a Evropska unija ga kao poseban entitet promovise na različite načine, jer u njemu vidi ostvarivanje ciljeva artikulisanih 2000. godine na Lisabonskom samitu. Bazirajući se na dokumentu *Education and Training 2010*, nastalom nakon formulisanje deklaracije, zemlje Evropske unije se obavezuju da samostalno kreiraju strategije doživotnog učenja, koje teže da ostvare nacionalne i nadnacionalne ciljeve i kroz koje se postiže harmonizacija u ovoj oblasti. Države članice, kao i potencijalni kandidati

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pokazuju razlike u načinima kreiranja politika što predstavlja i jedan od osnovnih razloga izvesne različitosti ciljeva strategija. Ipak, poželjni pravci u kreiranju prostora doživotnog učenja pokazuju više sličnosti kada posmatramo retoriku određenih zemalja što ukazuje na uticaj Evropske unije kao supranacionalnog kreatora politika. U skladu sa ovakvim viđenjem ovaj rad se sastoji iz tri tematske celine u kome se prva celina odnosi na hronološki prikaz razvoja nadležnosti Evropske unije u odnosu na obrazovne politike zemalja članica i mehanizama ostvarivanja svojih ingerencija. Važnost analize konteksta nalazimo u tome da se ne može više govoriti o komparativnoj analizi dve zemlje, a da se one ne stave u širi okvir putem koga se razumeju različite tendencije. Drugi deo rada odnosi se na prikaz nacionalnih modela kreiranja obrazovnih politika, analizu ciljeva strategija doživotnog učenja u kontekstu socio-ekonomske situacije država, i na kraju treća celina, odnosno zaključak koji predstavlja sintezu okvira Evropske unije i sličnosti i razlika u definisanim ciljevima strategija doživotnog učenja.

Polazna ideja istraživanja

Na samom početku važno je definisati šta će se podrazumevati pod pojmom politika i zbog čega. Ovaj rad se ne bavi praksom, tj. politikom u praksi već se fokusira na politiku kao diskurs (Green, 2002) polazeći od postmodernističke perspektive da su istina i znanje mnogostruki, kontekstualni i istorijski proizvedeni putem različitih diskursa. Autor Rui (2007) smatra da pojam politika može da pokrije veoma široku arenu i da može da se razume i koristi na različite načine, uključujući planove, odluke, dokumente i predloge. Ipak, on dalje navodi da istraživači koji se bave ovom oblašću najčešće posmatraju politiku kroz različita dokumenta, te će se stoga i ovaj rad na to fokusirati. U skladu sa tim, biće analizirane strategije doživotnog učenja od kojih su neke od njih (strategije Velike Britanije i Danske) nastale kao odgovor na zahtev Evropske komisije 2003. godine da svaka zemlja mora da kreira nacionalnu strategiju koja će biti u skladu sa principima koje je postavila Evropska unija, kako bi se stvorio prostor doživotnog učenja. S obzirom na pomenuto, analiziraće se sledeća dokumenta koja su i navedena u nacionalnim izveštajima pomenutih zemalja kao poslednje strategije koje se odnose na doživotno učenje, odnosno obrazovanje odraslih kroz perspektivu ovog koncepta:

1. Denmark's strategy for lifelong learning – Education and lifelong skills upgrading for all (Ministarstvo obrazovanja Danske, 2007)
2. The Lifelong learning strategy in Scotland – Life through learning (Škotsko ministarstvo obrazovanja, 2003)

3. Strategija obrazovanja odraslih (Vlada Republike Srbije, 2006)

Značajne teškoće javile su se pri izboru dokumenata i određenju jasnih kriterijuma tog izbora. Prvi kriterijum, a u skladu sa temom istraživanja, je bio da analizirana dokumenta predstavljaju odgovor na repere koje je postavila Evropska komisija da svaka zemlja članica treba da kreira nacionalnu strategiju doživotnog učenja. Od tri zemlje čije se strategije upoređuju Danska i Velika Britanija su realizovale taj zahtev. Što se tiče Srbije, ona kao zemlja kojoj je u interesu da se priključi Evropskoj uniji, kreirala je strategiju obrazovanja odraslih koja je kako se navodi u dokumentu „manifestacija doživotnog učenja“ (Vlada Republike Srbije, 2006:4).

Ove otežavajuće razlike proizilaze iz ekonomskog i društvenog konteksta samih zemalja, njihove osvešćenosti o relevantnosti doživotnog učenja, ali i odnosa prema nadnacionalnom kreatoru politika. Naime, izgleda da izbor dokumenata već sam po sebi predstavlja jedinicu analize i već podstiče uviđanje značajnih razlika između razmatranih zemalja. Usled nemogućnosti da postavimo apsolutno jedinstvene kriterijume pri izboru relevantnih dokumenata smatramo da je značajnije da se realnost ne ignoriše radi naučne preciznosti već da se ona prihvati, ali da se na nju pokuša odgovoriti. Dakle, nećemo pojednostaviti stvarnost radi ukalupljanja u određenu formu već ćemo je prigrliti, ali i istaći potencijalne nejasnoće koje se javljaju i koristiti ih kao izvor, a ne kao smetnju.

Drugo važno pitanje odnosi se na izbor zemalja čije se strategije doživotnog učenja kompariraju. Ono što je očigledno je članstvo Velike Britanije i Danske u Evropskoj uniji u kojoj doživotno učenje predstavlja osnovni princip razvoja evropskih politika obrazovanja i treninga (Hake, 1999). Ipak treba imati u vidu i realnost da dokumenta komisije imaju „različito značenje za različite evropske zemlje – u zavisnosti od toga da li su članice EU, kandidati, ili tek teže tom statusu“ (Medić i Popović, 2007: 129). Modeli kreiranja obrazovnih politika predstavljaju ključan razlog izbora navedenih zemalja čije se strategije upoređuju. Velika Britanija predstavlja takozvani model zasnovan na potražnji, Danska je predstavnik modela socijalnog partnerstva, dok Srbija, iako u procesu kreiranja politika postoji težnja za razvojem partnerstva, za sada predstavlja etatistički, centralizovani model. Način na koji vidimo udeo različitih modela regulacija i kreiranja politika biće detaljnije prikazan u poglavlju koje se ovim pitanjem i bavi.

Treće pitanje se odnosi na kontekst u kome nastaje koncept doživotnog učenja. Uključujući i organizacije kao što su OECD i UNESCO, Evropska unija ima više nego značajan uticaj na razvoj međunarodnog diskursa doživotnog učenja uopšte, a naročito na implementaciju pomenute koncepcije što je započeto Ugovorom u Mastrihtu 1992. godine (Lee, Thayer, Madyun, 2008). Stoga je ne-

ophodno opisati i kritički posmatrati „status“ doživotnog učenja koje kako kaže Dehmel (2006) često predstavlja „elastičan koncept skrojen da odgovara svim potrebama“ (str. 49). Evropska unija predstavlja sintezu OECD-ove neoliberalističke perspektive doživotnog učenja i UNESCO-vog humanističkog koncepta što je i jasno formulisano 1998. godine kada su, nakon Samita u Beču, ustanovljena 4 stuba doživotnog učenja Evropske unije – zapošljivost, preduzetništvo, adaptibilnost i jednake mogućnosti. Udeo ovih organizacija u uticanju na kreiranje strategija doživotnog učenja biće razmatran, ali isključivo u okviru hronološkog prikaza uloge Evropske unije, odnosno različitih evropskih zajednica u razvijanju i promovisanju samog koncepta, kao i uticaju na nacionalne obrazovne politike.

Evropska unija kao nadnacionalni kreator obrazovnih politika

U današnje vreme komparativna analiza nacionalnih politika ne može se realizovati na pravi način ukoliko se ignorišu nadnacionalni kreatori politika koji u slučaju Danske, Velike Britanije i Srbije predstavlja Evropska unija. Učenje odraslih i doživotno učenje tokom devedesetih godina prerasta u jedan od najvažnijih prioriteta zajednice (Field, 1996), da bi 2000. godine nakon formulisanja Lisabonske agende doživotno učenje postalo osnovni pristup u kreiranju obrazovnih politika, definišući ga kao ključni element strategije za povećanje konkurentnosti Evrope i kreiranja društva zasnovanog na znanju (Dehmel, 2006). Putem programskog pristupa, otvorenog metoda koordinacije, različitih mera i dokumenata, EU institucije imaju značajan uticaj u nacionalne politike. Međutim, počevši od Evropske ekonomske zajednice pa do danas postoji tenzija između država članica i višeg tela, gde države imaju pretenziju da osiguraju samostalnost u donošenju odluka vezanih za obrazovanje, naročito kada je reč o Velikoj Britaniji i nordijskim zemljama. Uopšteno govoreći, one preferiraju međudržavnu saradnju umesto nadnacionalnog nivoa, odnosno integracije (Olesen, prema: Dahl, 2003). Rezultat ove tenzije može da bude isključivo formalno pridržavanje akcionih planova EU čije izvršenje rezultira u kreiranju nacionalnih strategija doživotnog učenja. One su obično zasnovane na prethodno realizovanim akcionim planovima učenja odraslih, koje u slučaju zemlje kao što je Danska koje već imaju razvijenu kulturu doživotnog učenja postoje ponekad radi podnošenja izveštaja Komisiji, a ne radi stvarne implementacije, ignorišući takozvanu evropsku retoriku i koncentrišući se na nacionalne ciljeve. Takođe, potrebno je istaći da često postoji nejasnoća u terminologiji koja se koristi, tako da se neretko politike koje se odnose na učenje odraslih posmatraju kao politike doživotnog učenja, što je i razumljivo s obzirom na to da je ovo područje dugi niz godina zanemarivano u odnosu na inicijalno

obrazovanje. Posledica je da se, kao što je i u Srbiji slučaj, strategije doživotnog učenja artikulišu kroz strategije obrazovanja odraslih, iako se u pomenutoj jasno definiše da se ona odnosi samo na „obrazovanje namenjeno starijim od 18 godina koji nemaju status učenika, odnosno studenta“ (Vlada Republike Srbije, 2006). Međutim, opravdanje za analizu Strategije razvoja obrazovanja odraslih u Republici Srbiji predstavlja artikulacija da njenu polaznu osnovu čine pored ostalih sledeća međunarodna dokumenta: Memorandum o doživotnom učenju Evropske komisije, Evropski prostor doživotnog učenja i Kopenhaška deklaracija (Vlada Republike Srbije, 2006). Sve ovo predstavlja argumentaciju analize legitimiteta Evropske unije da utiče na nacionalne obrazovne politike i na razvijanje koncepta doživotnog učenja kao meta diskursa tih politika (Green, 2002). Razvoj nadležnosti EU u okviru obrazovanja predstavlja niz koraka od njenog osnivanja do danas, a spektar njenog interesovanja i aktivnosti se menjao tokom vremena i povećani uticaj na obrazovni program uglavnom proističe iz interesovanja za druge oblasti kao što je smanjivanje nezaposlenosti tokom osamdesetih godina prošlog veka (Ertl, 2003), čime se potencijalno može i objasniti insistiranje na ekonomskoj funkciji učenja. Uzimajući u obzir tekući proces evropskih integracija i kratkročnost određenih odluka deluje opravdano da se ovom problemu priđe hronološki i da se na taj način analizira istorijska dimenzija (Ertl, 2003). U ovom radu usvojićemo periodizaciju koju navodi Field (prema: Ertl, 2006) a koja se tiče dobijanja sve veće nadležnosti EU u oblasti kreiranja obrazovnih politika: od 1957. do sredine sedamdesetih, od sredine sedamdesetih do sredine osamdesetih, od sredine osamdesetih do 1992. godine i nakon 1992. godine.

I period

Pravna zasnovanost prvobitne Evropske zajednice počiva na tri ugovora: Ugovor u Parizu (1951) kojim je postavljena Evropska zajednica za uglj i čelik i dva Rimska ugovora kojima je ustanovljena Evropska ekonomska zajednica i Euratom. Ertl (2003, 2006) smatra da se nijedan od ovih ugovora ne odnosi na opšte obrazovanje već da u nadležnost tadašnje EEZ spada isključivo stručno obrazovanje, što je i razumljivo s obzirom na to da je ovim ugovorima formirana isključivo ekonomska zajednica, odnosno „Evropa trgovaca“, termin koji koristi Rubio (prema: Ertl, 2006) da bi istakao cilj formiranja tadašnje zajednice. Najjasnije odredbe koje se tiču stručnog obrazovanja mogu se naći u Rimskom ugovoru u članu 128:

Savet će, delujući na predlog Komisije i nakon konsultovanja Ekonomskog i Socijalnog komiteta, postaviti opšte principe za implementaciju zajedničkog stručnog

obrazovanja koji doprinosi harmoničnom razvoju kako nacionalnih ekonomija tako i razvoju zajedničkog tržišta (Rimski ugovor, 1957).

U to vreme osnovan je i Evropski socijalni fond kao jedan od fondova za stručno osposobljavanje i prekvalifikaciju koji se intenzivno koristio od strane država članica (Davies, 2003), a stručno obrazovanje je viđeno kao instrument razvoja privredne integracije Evropske ekonomske zajednice (Ertl, 2003). Ipak, ovo je jedan od najteže interpretiranih članova i Fahle (prema: Ertl, 2006) smatra da zemlje članice tumače navedeni član restriktivno i da je nadležnost Evropske komisije ograničena i u ovoj oblasti. Takođe, kada je Savet ministara 1963. postavio 10 principa za kreiranje zajedničke politike stručnog obrazovanja njihov pravni status je preispitivan i oni se nisu smatrali obavezujućim za države članice (Ertl, 2006). Može se zaključiti da je uloga Evropske zajednice kao kreatora politika više u indirektnom postavljanju pravca i ona je još uvek više međunarodna nego nadnacionalna.

II period

Za razliku od Dehmel (2006) koja smatra da se koncept doživotnog učenja počeo razvijati ranih sedamdesetih, autori Lee, Thayer i Madyun (2008) tvrde da prateći istorijske dokumente formulacija doživotnog učenja, odnosno obrazovanja u internacionalnim krugovima počinje kasnih šezdesetih. Field (2001) piše da je ideja „reklamirana“ krajem šezdesetih i početkom sedamdesetih. UNESCO 1965. godine počinje da koristi termin doživotno obrazovanje kako bi opisao koncept učenja kroz ceo život, i upotrebljava ga paralelno sa terminom permanentno obrazovanje. Doživotno obrazovanje uvodi i Paul Lengrand (1970), u to vreme direktor UNESCO instituta za obrazovanje (UIE) i ono što podrazumeva pod tim pojmom jeste „serija veoma specifičnih ideja, eksperimenata i postignuća, odnosno, obrazovanje u punom smislu te reči, uključujući sve aspekte i dimenzije, neprekinuti razvoj od prvog trenutka života do posledneg“ (Lengard, 1970: 20). Zanimljivo je da je kontekst u kome se javlja interesovanje za doživotno obrazovanje sveopšta kriza šklostva i visokog obrazovanja šezdesetih, kao i francuski društveni pokret 1968. Pod okriljem evropskog socijalnog liberalizma nastaje i Faure (1972) izveštaj *Učenje da se bude: Svet obrazovanja danas i sutra* koji predstavlja izrazito humanistički pogled na obrazovanje i ima široke socijalne i kulturne ciljeve. Pored toga, osnovni cilj doživotnog obrazovanja je čovekovo samoostvarenje, odnosno „fullfilment of man“ što se i ogleda i u samom nazivu izveštaja i korespondira sa tadašnjim društvenim težnjama i kritikama formalnog sistema obrazovanja. Paralelno sa delatnošću UNESCO-a, početkom sedamdesetih

tih Evropski savet objavljuje dokumente u vezi sa doživotnim učenjem, od kojih je jedan *Permanentno obrazovanje* (Evropski savet, 1970), dok OECD 1973. godine stupa na scenu sa publikacijom *Povratno obrazovanje: Srtategija doživotnog učenja*, u kojoj se doživotno učenje vidi više kao instrument razvoja ljudskog kapitala sa blagim provejavanjem značaja socijalne demokratije. Ovim dokumentima je postavljen temelj doživotnom učenju i ona su početak kasnijeg dualizma između posmatranja obrazovanja pretežno kroz njegovu ekonomsku funkciju (OECD) i obrazovanje za samoostvarenje (UNESCO). Belanger (prema: Dehmel, 2006) piše da je doživotno obrazovanje ranih sedamdesetih bilo euforija izgrađena na posleratnom verovanju u beskrajn prosperitet. Kasnih sedamdesetih i kasnije tokom osamdesetih interesovanje za doživotno obrazovanje jenjava (Dehmel, 2006) i to pretežno zbog uticaja novonastale ekonomske krize.

Dakle, važan događaj ili bolje reći stanje ranih sedamdesetih u Evropi je naftna kriza koja nastaje 1973. kada su članice Organizacije arapskih zemalja izvoznika nafte kao odgovor na to što je Amerika odlučila da podrži Izrael, odnosno obezbedi svoju vojsku tokom Jom Kipur rata, proglasile embargo prema Americi i nekim evropskim državama. Ovakva odluka se odražava na države članice Evropske zajednice i kao posledica nastaje pomenuta ekonomska kriza. Prepoznavanje činjenice da je veliki broj mladih ljudi napustio školu i ušao nekvalifikovano u svet rada dovodi do ponovnog razmatranja uloge stručnog obrazovanja na nivou Evropske zajednice. Kao posledica ovoga, 1974. godine je formiran Komitet za obrazovanje koje su činila Ministarstva obrazovanja država članica kao i Evropska komisija (Ertl, 2006). Rubio (prema: Ertl, 2006) smatra da je nakon ovog događaja Evropska zajednica postala i „Evropa obrazovanja“. Formiranju Komiteta je prethodio Janne izveštaj 1973. *For a Community Policy in Education* u kome se ističe da je razdvajanje opšteg i stručnog obrazovanja glavna prepreka kreiranju zajedničke politike. Ekonomski pritisak u tom periodu bio je preduslov kreiranja nove veze između opšteg i stručnog obrazovanja, kada se opšte obrazovanje stavlja u službu stručnog i tada nastaje koncept „vocalisation“ kojim se opisuje pristup obrazovanju od strane Evropske komisije. Nadalje, osim ekonomskih razloga pojačan interes za obrazovanje je i kreiranje „evropskog građanina budućnosti“ (Leibfried i Pierson, 1996), koji i u kasnijim dokumentima i aktivnostima postoji kao jedan od ciljeva učenja. Nastaje koncept *Evropske dimenzije* u obrazovanju koji je prvi put pomenut u Janne izveštaju, a za cilj ima razvoj evropskog identiteta mladih ljudi. Može se reći da su ovim postavljene osnove budućeg evropskog interesovanja za doživotno učenje koje inkorporira ekonomske i demokratske ciljeve.

III period

Iako neki autori smatraju da je ovo period opadanja interesa (Dehmal, 2006), Lee, Thayer i Madyun (2008) daju interesantnu interpretaciju ovog doba. Kraj sedamdesetih i početak osamdesetih oni vide kao period zainteresovanosti za doživotno učenje, ali u novom neoliberalnom ruhu i to naročito od strane OECD-a. Ovakav novi ekonomski poredak značajno će uticati na kasnije kreiranje obrazovnih politika i na podrazumevajuću i preovladavajuću ekonomsku funkciju obrazovanja i skoro potpuni zaborav izveštaja *Učenje da se bude*, koje u svetlu neoliberalizma predstavlja beskorisni trošak i utopijske ideale. U ovom periodu se nalazi koren kasnije opterećenosti instrumentalnom vrednošću obrazovanja i izrazitog zanemarivanja njegovog značaja za lični razvoj od strane kreatora politika, mada seme vidimo i u prethodnim periodima kada se Evropa fokusirala isključivo na stručno obrazovanje, a sve radi ekonomskog razvoja. Iako se kasnije devedestih i dvehiljaditih u različitim dokumentima EU i u nacionalnim strategijama ističu kako ekonomski tako i neekonomski ciljevi učenja, odnosno socijalna inkluzija, aktivno građanstvo i lični razvoj, potrebno je razlikovati retoriku politika od njihove implementacije. Kako je navedeno u CONFINTEA izveštaju za Evropu i Ameriku (Keogh, 2009) kada je reč o sporovođenju politika ekonomska agenda je privilegovana kroz veće javno ulaganje u stručno orijentisano učenje odraslih u odnosu na liberalno. Ipak, UNESCO danas, a i osamdesetih, pokušava da održi koncept doživotnog obrazovanja, a ne učenja što je zasnovano na ideji socijalnog liberalizma kao ključnoj ideologiji.

Evropska zajednica se u to vreme, a može se reći i danas, nalazi negde između neoliberalizma i socijalnog liberalizma pokušavajući da kroz ciljeve dokumenata i aktivnosti zadovolji i jednu i drugu „stranu“. Što se tiče konkretnih aktivnosti u oblasti obrazovanja, nakon odluke Evropskog suda pravde 1976. godine da evropske institucije poseduju pravnu zasnovanost da usvajaju i propisuju zakone u oblasti stručnog obrazovanja započete su različite inicijative Evropske zajednice. Izazovi razvoja informacione tehnologije i smanjenje nezaposlenosti su neki od glavnih razloga pokretanja obrazovnih programa (Ertl, 2003). Nastaju programi Comett (European Community Action Programme in Education and Training for Technology), Erasmus (European Action Scheme for the Mobility of University Students), i PETRA najznačajniji program za oblast stručnog obrazovanja koji su se tokom vremena menjali i prilagođavali novim izazovima i idejama.

IV period

Potpisivanjem Mاستrihtskog ugovora i konačnim formiranjem Evropske unije nastaje period koji karakteriše najveća zainteresovanost za doživotno učenje i tokom koga EU ostvaruje najveći uticaj na kreiranje obrazovnih politika zemalja članica. Za ovo postoji više razloga od kojih su neki: pravno zasnovan legitimitet EU da se bavi kako stručnim tako i opštim obrazovanjem, sve veće internacionalno interesovanje za doživotno učenje koje je artikulirano kroz važne publikacije međunarodnih organizacija, konačna promena paradigme sa obrazovanja na učenje, i na kraju ideja artikulirana Lisabonskim sporazumom da evropska ekonomija postane najkompetitivnija ekonomija u svetu (Savet, 2000).

Nadležnost EU na polju obrazovanja definisana je Mاستrihtskim ugovorom posebno za opšte i posebno za stručno obrazovanje. Kao što je i očekivano, njena delatnost u okviru opšteg obrazovanja je ograničena na „razvoj kvalitetnog obrazovanja kroz ohrabivanje saradnje između zemalja članica“ (Mاستrihtski ugovor, 1992, član 126). Nasuprot tome „zajednica će implementirati politiku stručnog obrazovanja koja će podržati i biti dodatak aktivnostima država članica“ (Mاستrihtski ugovor, 1992, član 127). Na ovaj način Evropska unija otvara sebi prostor za ispunjene postavljenih ciljeva kroz razvoj stručnog obrazovanja, iako i dalje ostaje tenzija između zemalja članica kao samostalnih donosioca odluka i Evropske unije koja je nadnacionalni kreator politika i čije mere su obavezujuće. Ertl (2006) smatra da su oba članka vrlo pažljivo formulisana i da eksplicitno isključuju bilo kakvu harmonizaciju zakona i regulacija država članica, kao i da Unija u potpunosti poštuje odgovornost zemalja za sadržaj učenja i organizaciju obrazovnog sistema. Kako kaže Philips (2003) formulacija pomenutih članova uverava one koji se plaše upada Brisela u ona pitanja koja su tradicionalno pripadala nacionalnim vladama. Ove klauzule su ogledalo principa supsidijarnosti formulisanom kroz član 3 b:

„U oblastima koje ne spadaju u njenu isključivu nadležnost, Zajednica će preduzimati akcije, u skladu sa principom supsidijarnosti, samo ako se ciljevi predloženih akcija ne mogu postići od strane država članica“ (Mاستrihtski ugovor, 1992, član 3b).

Iako se može primetiti konstantno povećavanje nadležnosti Zajednice od Rimskog ugovora 1957. pa do formiranja EU 1992, pomenutim principom države članice su održale autonomiju u donošenju odluka u vezi sa obrazovanjem. Devedesete su u vezi i sa donošenjem prvih dokumenata povezanim sa doživotnim učenjem. Godine 1994. Bela knjiga *Rast, konkurentnost i zapošljivost* (Growth, Competitiveness and Employment) i nakon toga 1995. White paper *Poučavanje i učenje: Prema društvu učenja* (Teaching and Learning: Towards the Learning Society). Dokument iz 1995. je imao ključnu ulogu u daljem razvoju

i uspostavljanju doživotnog učenja kao vodećeg pristupa u kreiranju nadnacionalnih i nacionalnih obrazovnih politika, iako je bio dosta kritikovan od strane zemalja članica kao i različitih autora (Field, prema: Ertl, 2006, Hake, 1999) koji smatraju da problem socijalne inkluzije nije bio zastupljen u onoj meri u kojoj je to bilo potrebno.

Paralelno sa dokumentima Evropske unije, doživotno učenje ulazi na velika vrata i na internacionalnoj sceni. OECD publikacija iz 1996. godine *Doživotno učenje za sve* (Lifelong learning for all) i Delorov (1996) izveštaj *Učenje: Skrivena riznica* (Learning: the treasure within) su dokumenti koji imaju najznačajniji doprinos na polju doživotnog učenja. Hodgson (prema: Dehmel, 2006) vidi ovo pojačano interesovanje internacionalnih organizacija kao odgovor, ili čak odbranu od promenljive, zastrašujuće i nepoznate tehnološke, ekonomske i političke okoline. Doživotno učenje predstavlja jedinstveni i univerzalni odgovor na globalizaciju, razvoj nove tehnologije, na društvo koje stari i na kulturne i društvene promene (Green, 2002) i ovde možemo primetiti ono što je na početku rada već istaknuto a to je da se doživotno učenje posmatra kao „rastegljiv koncept skrojen za sve potrebe“ (Dehmel, 2006, str. 49).

Kasnih devedesetih, tačnije marta 1999. dolazi do najveće krize Evropske unije od Rimskog ugovora 1957. Nakon nekoliko meseci kritikovanja Evropske komisije od strane Evropskog parlamenta da nisu u stanju da preuzmu odgovornost za navodnu korupciju, svih dvadeset komesara, uključujući i tadašnjeg predsednika Žaka Santera (Jacques Santer), daju ostavku. Istraživanja Eurobarometra koja su sprovedena 1999. pokazuju da 49% Evropljana podržava članstvo njihove zemlje u EU, 14 % je protiv dok 27% stanovnika ima neutralan stav po ovom pitanju. Za ovaj rad je interesantan podatak da javnost Velike Britanije najmanje od svih zemalja podržava članstvo svoje države i da je zainteresovanost da se izađe na evropske izbore bila veoma niska.

U ovakvoj atmosferi 2000. godine dolazi do usvajanja Lisabonske deklaracije od strane Lisabonskog saveta šefova vlada zemalja Evropske unije čiji je sveukupni cilj da Evropska unija postane najkonkurentnija i najdinamičnija ekonomija zasnovana na znanju sposobna za održivi ekonomski rast sa boljim radnim mestima i većom socijalnom kohezijom (Savet, 2000). Kao posledica Lisabonskih odluka dolazi do povećanja integracije obrazovnih politika u Evropi, a autori Novoa i DeJong – Lambert (2003) smatraju da dolazi i do njihove unizacije i to najviše kroz dve odluke: jedna je vezana za kreiranje ekonomije zasnovane na znanju, što posledično uključuje i investiranje u ljude i postavlja obrazovanje kao prioritet Evrope, druga je u vezi sa otvorenim metodom koordinacije kao sredstva širenja dobre prakse i postizanja veće konvergencije u postizanju glavnih ciljeva Evropske unije. Ovakav metod omogućava Uniji da postavi smernice

za politike zemalja članica i vremenski okvir za njihovu implementaciju, kao i utvrđivanje zajedničkih indikatora i repera na osnovu kojih se može pratiti uspeh država članica u ostvarivanju zajedničkog cilja. Na ovaj način, slobodno se može reći da je Evropska unija zaobišla princip supsidijarnosti koji joj ograničava upliv u određene oblasti i ona postaje relativno „suptilan“, nadnacionalni kreator politika. Reperi koje postavlja svojim članicama postaju političke obaveze (Koegh, 2009) i njihov progres je praćen i evaluiran kroz izveštaje svake zemlje koji su upućeni Komisiji. Doživotno učenje sada se vidi kao jedan od osnovnih prioriteta Evropske unije i ono je u osnovi instrument postizanja ciljeva formulisanih na Lisabonskom samitu. U skladu sa tim, Evropska komisija je 2000. godine u oktobru, predstavila *Memorandum o doživotnom učenju* koji još jednom potvrđuje da je doživotno učenje esencijalni element u tranziciji ka ekonomiji i društvu zasnovanom na znanju. Doživotno učenje je po prvi put „jasno“ definisano i ono predstavlja „sve svrshodne aktivnosti, preduzete na stalnoj osnovi sa ciljem usavršavanja znanja, veština i kompetencija“ (Evropska komisija, 2000:3). Kasnije, 2002. godine ciljevi Lisabonske agende u vezi sa doživotnim učenjem operacionalizovani su od strane Komisije u dokumentu *Obrazovanje i trening 2010*. (Education and training 2010). Ovim dokumentom je istaknuta neophodnost da doživotno učenje postane realnost putem definisanja nacionalnih sveobuhvatnih strategija doživotnog učenja koje uključuju validaciju prethodnog učenja i kreiranja mogućnosti za dalje učenje i čije stvaranje bi bilo zasnovano na socijalnom partnerstvu. Ovim je postavljena obaveza za države članice da formulišu nacionalne strategije koje će biti u skladu sa situacijom i kompetencijama država članica, ali prema prioritetima i principima postavljenim od strane EU. Ova obaveza i način njenog ostvarivanja predstavlja i objašnjenje razloga zbog čega je u ovom radu veliki deo posvećen analizi nadnacionalnog tela koje, čini se, imaju veći uticaj na kreiranje strategija doživotnog učenja od samih država. Bilo je potrebno hronološki prikazati pravnu zasnovanost Evropske unije kao nadnacionalnog kreatora obrazovnih politika, kako bi se ono što čini nacionalne politike posmatralo kao mozaik, odnosno kao delovi jedne veće celine. Uprkos činjenici da je moderna EU mnogo drugačija „životinja“ od one u njenim ranim danima, ekonomski rast i konkurentnost ostaju u srcu „projekta Evropska unija“, iako u drugačijem ekonomskom kontekstu koji karakterišu globalizacija i društvo znanja pre nego posleratna rekonstrukcija (Davies, 2003).

Tri modela kreiranja politika doživotnog učenja – Velika Britanija, Danska i Srbija

Kao što je napomenuto, Velika Britanija, Danska i Srbija predstavljaju skoro „idealne“ primere različitih modela kreiranja obrazovnih politika. Regulacija i upravljanje obrazovanjem i treningom se vide kao ključni faktor razlika koje postoje između obrazovnih sistema (Green, 2002) i koji imaju značajan uticaj na proces i ishode obrazovanja. Način kreiranja obrazovnih politika predstavlja i jedan od osnovnih razloga specifičnosti nacionalnih politika i omogućava njihovo bolje razumevanje. Svakako, regulacija obrazovanja je nastala u kontekstu određenih ideologija koje se u slučaju ove tri zemlje naročito razlikuju i predstavljaju proizvod istorijskih, ekonomskih i društvenih okolnosti. Ono što karakteriše većinu zemalja Evropske unije jeste povlačenje vlade i sve veća decentralizacija u ovoj oblasti. U mnogim državama uloga ministarstava i državnih organa postaje „upravljanje preko postavljanja ciljeva“ (Green, 2002), što znači da niži nivoi autoriteta odlučuju kako će se ti ciljevi postići. Naglašava se princip supsidijarnosti i teži se ka tome da se donosioci odluka nalaze tamo gde se dešava i učenje. Smatra se i da je decentralizovano donošenje odluka efektivnije jer je u tom slučaju bliže realnosti i postoji veća svesnost o potrebama lokalnog stanovništva. Svakako, decentralizacija se može posmatrati kroz jedan kontinuum gde država ima manju ili veću ulogu u donošenju odluka, pa u odnosu na to se mogu pronaći i različiti načini regulacije obrazovanja i učenja.

Prokou (2008) predlaže tri različita modela:

1. Model zasnovan na potražnji u kome su sami ljudi odgovorni za učenje, a organizacije imaju interes da kreiraju pogodnu okolinu za učenje. Velika Britanija predstavlja tipičan primer ovakvog načina regulisanja obrazovanja i začetak ovog modela predstavljaju principi neoliberalizma koji su promovisani početkom osamdesetih godina pod vladom Margaret Tačer koja je tvrdila da je tržište najbolji mehanizam proizvodnje i distribucije resursa. Tržište je viđeno kao superiorno u odnosu na državu jer može mnogo brže i fleksibilnije da odgovori na javne potrebe (Okumoto, 2008) i stoga je bilo važno da se obezbedi slobodna konkurencija i smatralo se da ona automatski dovodi do razvoja. U skladu sa tim, obrazovanje je prepušteno tržištu pa su institucije delovale kao male kompanije koje su se takmičile za svoje mušterije. Međutim, tržište može brže i fleksibilnije da odgovori na potrebe, ali pitanje je čije? Isticanjem individualizma i nemešanjem

države nastaje još veći jaz u obrazovnoj strukturi jer oni koji imaju visok nivo obrazovanja se obrazuju sve više. Kasnih devedestih je došlo do promene u vladajućoj ideologiji, uzrokovano i promenom vlade, što je i dovelo do nove političke vizije, takozvanog Trećeg načina (the Third Way) i uzrokovalo da država postane „država koja ulaže u društvo“ (social investment state). Doživotno učenje postaje strateška mera za razvoj inkluzivnog i pravednog društva koje je konkurentno na globalnom tržištu (Okumoto, 2008). Hodgson (prema: Okumoto, 2008) pojašnjava novi pristup doživotnom učenju koji karakteriše kontinuiran fokus na stimulisanje individualnih zahteva za učenje, fokusiranost na potrebe učenika pre nego na provajdera i podrška decentralizaciji budžeta u snažnom okviru planiranja, partnerstva i saradnje.

2. Model socijalnog partnerstva prepoznaje značaj individualne odgovornosti i zastupa više agensa i interesnih strana (stakeholders). Osnovna razlika u odnosu na prethodni model je isticanje ograničenja tržišta i značaja državne regulacije. Najformalizovaniji oblik socijalnog partnerstva nalazi se u nordijskim zemljama. Danska je nakon reforme u obrazovanju odraslih 2001. godine ustanovila podeljenu odgovornost između državne, regionalne i lokalne uprave, a sami partneri deluju iz okvira različitih vrednosti, stavova, očekivanja, ciljeva i pristupa. Stejkholderi uključuju upravu na svim nivoima države, državne agencije, javne provajdere, nevladine organizacije uključujući civilne organizacije, komercijalne provajdere i potencijalne učenike i njihove predstavnike (Keogh, 2009). U samom nacionalnom izveštaju Danske (2009) kao socijalni partneri navode se i poslodavci i unije zaposlenih, odnosno sindikati, međutim precizira se da se to odnosi na programe stručnog obrazovanja.
3. Treći model se naziva etatiistički model, jer postoji tendencija da država dominira u regulisanju obrazovnog sistema. Ovakvi centralizovani modeli se često sreću u južnim evropskim i mediteranskim zemljama (Grčka i Portugal), ali takođe i u zemljama Jugoistočne Evrope i svakako Srbije. Ono što je interesantno je da kada je u pitanju obrazovanje odraslih u Srbiji, kako je navedeno u nacionalnom izveštaju, postoji društvena nebriga za ovo područje, što znači da je daleko od toga da država dominira, pre se može reći da je njeno nemešanje i

doskorašnje neprepoznavanje obrazovanja odraslih dominantan problem. Ipak, kada je reč o Strategiji obrazovanja odraslih pozivajući se na artikulaciju da je ovaj dokument „jedan od instrumenata za rešavanje ključnih socijalnih i ekonomskih problema Republike Srbije“ (Vlada Republike Srbije, 2006, str. 6), može se reći da navedeni model ipak odgovara načinu donošenja odluka, jer je jasno rečeno da su interesi države na prvom mestu. S obzirom na dotadašnje nepriznavanje značaja učenja odraslih i zanemarivanje tog područja, kao i na višegodišnju nepovoljnu ekonomsku scenu u Srbiji, jasno je zbog čega se ovo postavlja kao ključni cilj. Što se tiče socijalnog partnerstva ono je prisutno u nekom obliku, ali je i dalje nedovoljno razvijeno, te je iz tog razloga Srbija ipak na drugoj strani pomenutog kontinuuma. Pretpostavlja se da partneri treba da imaju jednaku ulogu, odnosno moć uticaja, na šta se u slučaju Srbije ne može dati potvrđan odgovor. U svakom slučaju, socijalno partnerstvo je predstavljeno kao jedan od ciljeva Strategije obrazovanja odraslih, a kao budući socijalni partneri navedeni su država, poslodavci, zaposleni, privredne i stručne asocijacije, udruženja, naučnoistraživačke i obrazovne institucije i pojedinci (Vlada Republike Srbije, 2006). Čini se da, poredeći sa socijalnim partnerstvom u Danskoj, nevladine i civilne organizacije ostaju neprepoznate što je verovatno još jedan od razloga koji dovodi i do razlika u definisanju ciljeva strategije.

Navođenje tri različita modela kreiranja politike doživotnog učenja ima za cilj da prikaže različite pristupe koji neminovno dovode i do ključnih razlika u samoj formulaciji strategija, odnosno definisanju njenih ciljeva. Nakon ovog poglavlja može se reći da kreiranje politika dolazi sa različitih strana i ono je odgovor na ciljeve Evropske unije, tržišta, same države, i socijalnih partnera. Interesantno je da socijalno partnerstvo ipak predstavlja dominantan i najpoželjniji oblik, što je i u skladu sa tendencijom ka decentralizaciji, samo što ostaje nejasno ko definiše, ko će od stejkholdera donositi odluke, što posredno i utiče na same dokumente. Pitanje je: ko ima poslednju reč?

Pozicije država članica prema EU i implikacije na kreiranje politika

Analizirajući diskurs, odnosno Evropsku uniju kao kreatora politika polako se krećemo ka kontekstu samih zemalja koje predstavljaju još jedan nivo analize koji je značajan za nastajanje dokumenata. Ipak, budući da su one odgovor na postavljene repere i preporuke definisane od strane Evropske komisije, akcenat u ovom radu je više bio stavljen na Evropu kao kreatora politika nego na kontekst samih zemalja. Za ovakvo opredeljenje nalazimo opravdanje u tome da se ipak u ovom radu bavimo politikom kao diskursom, a ne njenom implementacijom. Naime, navedeni dokumenti predstavljaju hibrid sačinjen od predloga EU i prioriteta samih država. Što se tiče dostizanja ciljeva, odnosno politike u praksi, pretpostavljamo da bi ona više odražavala kontekst samih zemalja i postojale bi mnogo veće različitosti nego sličnosti. Ipak, kada je reč o strategijama za budućnost „Evropa ‚sutra‘ i njena vizija budućnosti – nešto je što dele sve zemlje Evrope i što im je zajedničko, mnogo više nego što su im zajednički i slični problemi i izazovi današnjice“ (Medić i Popović, 2007: 138). Međutim, ne možemo da ne primetimo tenziju između težnje država da ostanu autonomne u donošenju odluka i postavljanju ciljeva, ali i da „odrade“ ono što Unija nalaže. Interesantan slučaj je Velika Britanija koja je formalno odgovorila na postavljen zahtev da kreira strategiju doživotnog učenja što se može videti u izveštaju Evropske komisije iz 2009. Ukoliko zagrebemo površinu, startegija je usvojena od strane škotskog ministarstva i odnosi se samo na Škotsku, jer su tri države u okviru Velike Britanije autonomne po pitanju obrazovanja (Engleska, Vels i Škotska). Engleska koja predstavlja nesumnjivo najrazvijeniji deo kraljevstva nastavlja da prati i ispunjava svoje ciljeve. Različite stavove prema EU možemo posmatrati i kroz status same države, kao i istoriju njenog priključivanja. Velika Britanija je neodlučan partner još od 1973. kada se formalno priključila i ona je videla zajedničko ekonomsko tržište kao cilj sam po sebi, dok u isto vreme pokazuje žestok otpor u pitanjima zajedničke socijalne politike, uključujući i obrazovanje (Economou, 2003). Kao što je već napomenuto interes nordijskih zemalja uključujući i Dansku za priključivanje EU je bio pretežno ekonomski interes širenja tržišta, dok je politička intergracija predstavljala više pretnju nego težnju (Dahl, 2003). Možda bi se moglo reći da države članice nalaze kompromis u tome da isporuče EU ono što se od njih zahteva, a da pri tom neometano razvijaju svoje politike i koračaju u pravcu sopstvene vizije. Izgleda da različit status u EU različito i obavezuje, jer Srbija kao potencijalni kandidat mora da ostvaruje zahteve EU kako bi uspela na svom planiranom putu priključivanja.

Socio-ekonomski kontekst Škotske, Danske i Srbije i ciljevi strategija doživotnog učenja

Što se tiče konteksta samih zemalja, postoji očigledna razlika između njihove trenutne socijalne i ekonomske situacije koja značajno utiče na to da li se učenje posmatra kao sredstvo rešavanja postojećih problema (Srbija i Škotska) ili je ono instrument daljeg razvoja (Danska). Kako je istaknuto u Danskoj strategiji, ona je zemlja sa visokim procentom zaposlenosti stanovništva i relativno ravnopravnom distribucijom dohotka. Karakteriše je održiv razvoj ekonomije od 1997. godine i sektor usluga kao važan deo privrede, a nezaposlenost je smanjena za 3% u 2007. godini. Dansko tržište rada je veoma fleksibilno i međunarodne studije ukazuju na činjenicu da je Danska zemlja sa najvećim nivoom konkurentnosti i jedna od zemalja koja najviše ulaže u razvoj ljudskih resursa. Kako je navedeno u strategiji regeneracija „države blagostanja“ (Ministarstvo obrazovanja Danske, 2007: 5) se postiže kroz konkurentnost i socijalnu koheziju što predstavlja i ukupni cilj strategije koji je artikulisan kroz „kreiranje društva znanja“ (Ministarstvo obrazovanja Danske, 2007: 5). U ovako definisanom cilju se vidi dvojak uticaj, sa jedne strane, snage visokorazvijene danske ekonomije, a s druge, cilj Evropske unije da postane najkonkurentnija i najdinamičnija ekonomija zasnovana na znanju, sposobna za održivi ekonomski rast sa boljim radnim mestima i većom socijalnom kohezijom (Savet, 2000). Obrazovanje, doživotno usavršavanje, istraživanje i inovacije se ističu kao ključni instrumenti za postizanje ovog cilja. Nadalje, kroz strategiju se navodi da je održavanje pozicije kao jedne od najbogatijih država sveta moguće samo ukoliko svi imaju dobre mogućnosti i želju za usvajanjem novih znanja i korisnih kvalifikacija i kompetencija tokom života. Dokument služi ostvarivanju sledećih ciljeva: lični razvoj, aktivno građanstvo i participaciju u društvu kroz koje možemo videti težnju da se nacionalni ciljevi usaglase sa pravcem razvoja preporučenim od EU. Ipak, glavni cilj ostaje konkurentnost na tržištu i dalji razvoj ekonomije, a društveni i lični razvoj ostaje na nivou retorike i kao ignorisano nasleđe UNESCO-a kome se ne vidi realna svrha.

Škotska je jedna od država Velike Britanije koja je delimično autonomna, uglavnom na području obrazovanja i kulture. U odnosu na Englesku kao i razvijene zemlje EU, nju karakteriše relativno slab ekonomski razvoj i niska produktivnost što predstavlja jedan od osnovnih problema na koje škotsko ministratsvo želi da odgovori, a učenje i razvoj veština predstavljaju način za rešavanje navedenog. Takođe, u strategiji je istaknuto da je dominantan problem i sve veće starenje stanovništva. Interesantno je da se cela Velika Britanija suočava sa pretnjom internacionalnog terorizma i kao posledica dolazi do značajne socijalne isključenosti

određenih etničkih i religijskih manjina (CONFINTEA UK Nacionalni izveštaj, 2009). Kao rezultat toga javlja se fokusiranost na smanjivanje diskriminacije, i, moglo bi se reći da se u skladu sa tim definišu i ciljevi doživotnog učenja. Ovo je naročito relevantno za period u kome nastaje strategija, a to je početak dvehiljaditih kada strah od terorizma predstavlja dominantan problem sa kojim se UK suočava. Još jednom želimo da uvedemo zanimljivo zapažanje da je doživotno učenje „elastičan koncept skrojen da odgovara svim potrebama“ (Dehmel, 2006) od razvoja ekonomije, smanjivanja nezaposlenosti, pa do rešavanja posledica terorizma. Kohezija zajednice i obrazovanje za aktivno građanstvo se vidi kao poželjan pravac u odnosu na tekuće probleme, a doživotno učenje predstavlja idealan instrument njihovog rešavanja. U strategiji se navodi da ljudi nisu zainteresovani isključivo za svoju potencijalnu zaradu, već je istaknuto da „živimo u svetu u kome postoji velika raznovrsnost kultura, znanja, veština koji treba da se vrednuju i neguju. Mi želimo društvo u kome se ljudi aktivno angažuju u svojim lokalnim i nacionalnim zajednicama i učenje omogućava ljudima da to i urade“ (Ministarstvo obrazovanja Škotske, 2003: 7). U skladu sa tim doživotno učenje doprinosi razvoju društva kroz ostvarivanje drugih društvenih ciljeva kao što su građansko učešće, održivi razvoj, poboljšanje zdravlja i blagostanja, smanjivanje kriminala i veće socijalne kohezije. Dakle, doživotno učenje u Škotskoj je usmereno na „lični razvoj, zapošljavanje i adaptibilnost, aktivno građanstvo i socijalnu inkluziju“ (Ministarstvo obrazovanja Škotske, 2003: 7). Ponovo možemo da uočimo povezanost sa ciljevima Evropske unije iako postoje različiti konteksti u kome doživotno učenje služi kao element razvoja, u osnovi države članice „pričaju isto“ kada je reč o definisanju ciljeva. Moglo bi se reći da se na ovaj način one ili približavaju i stvaraju jedinstvenu Uniju ili udovoljavaju i nastavljaju da rade po svome. Države članice su bliske u retorici doživotnog učenja, ali se one značajno razlikuju kada je reč o strategiji implementacije i podeli odgovornosti, što ima veze sa nacionalnim kontekstom i navedenim modelima kreiranja politike.

Srbija je na potpuno drugačijem mestu od onoga gde se nalaze Danska i Velika Britanija, kako u odnosu na socio-ekonomski razvoj, tako i u odnosu na njenu poziciju prema Evropskoj uniji, odnosno bolje reći poziciju EU prema Srbiji. Dok se Evropa devedesetih ujedinjavala, Srbija je prolazila kroz razarajuće godine u kojima dolazi do razaranja bazične infrastrukture društva i ljudskih resursa (Medić, Popović, Milanović, 2009). Nakon dugogodišnje krize, od 2000. godine Srbija je otpočela intenzivne socio-ekonomske reforme što uključuje dramatične promene u zakonodavstvu, razvoj strategija u mnogim oblastima i prihvatanje sinhronizacije sa trendovima Evropske unije. Međutim, period nakon 2003. godine je obojen novim krizama kao što su odvajanje Crne Gore i proglašenje samostalnosti Kosova, što je skrenulo fokus sa obrazovanja na goruće probleme koje

treba rešiti. Takođe, 2006. godine je došlo do suspenzije pregovora o Sporazumu o stabilizaciji i pridruživanju, što kao posledicu ima izostanak orijentacije prema evropskim standardima i dostignućima (Medić, Popović, Milanović, 2009). Ipak, u ovom periodu je nastavljen, iako dosta usporen, privredni razvoj zemlje, ali i dalje postoji značajno velika nezaposlenost stanovništva koja je 2005. godine veoma visoka (kreće se od 21% do 30% u zavisnosti od metodologije računanja). Naročito frapantan podatak je da je dominantno učešće starosne grupe od 15 do 25 godina sa stopom nezaposlenosti od 44,83% što je tri puta više od prosečne stope nezaposlenosti ove starosne grupe u državama EU (Medić, Popović, Milanović, 2009). U ovakvoj klimi nastaje i strategija obrazovanja odraslih u kojoj su istaknuti sledeći ključni problemi:

- Nizak nivo ekonomskog razvoja;
- Velike disproporcije u ekonomskoj, demografskoj i obrazovnoj strukturi;
- Usporen populacioni rast i smanjenje broja dece i mladih i uvećanje broja starih u ukupnoj populaciji;
- Siromaštvo značajnog dela stanovništva;
- Visoko učešće mladih do 30 godina u ukupnoj nezaposlenosti;
- Nepovoljna obrazovna struktura zaposlenog stanovništva;
- Nepovoljna obrazovna i kvalifikaciona struktura nezaposlenog stanovništva;
- Nedostatak sistemskog pristupa u razvoju obrazovanja i učenja odraslih (Vlada Republike Srbije, 2006).

Obrazovanje odraslih je prepoznato kao osnovni instrument za rešavanje socio-ekonomske situacije zbog čega je naglasak stavljen na stručno obrazovanje i obuku odraslih. Iako Evropa ističe značaj obrazovanja za ekonomski razvoj s jedne strane, i obrazovanja za lični razvoj, samoostvarenje i aktivno građanstvo s druge strane, u strategiji je dominantno prepoznatljiva ekonomska funkcija obrazovanja, a „humanističko-građanska orijetacija služi više kao dekoracija za dnevno političke svrhe“ (Medić i Popović, 2007, str. 130). U strategiji je navedeno da se principi održivog razvoja, unapređivanje zapošljavanja, socijalne kohezije i demokratizacije društvenih odnosa poštuju (Vlada Republike Srbije, 2006) međutim ostaje do kraja nejasno na koji način se to poštovanje iskazuje. Definisani osnovni ciljevi strategije su sledeći: obezbeđenje dostupnosti sistema obrazovanja i obuke svim kategorijama odraslog stanovništva kroz uspostavljanje institucionalnog i programskog pluralizma u sistemu obrazovanja odraslih; decentralizacija i partnerski pristup u upravljanju, organizaciji i realizaciji obrazovanja odraslih i obezbeđenje kvaliteta obrazovanja i osposobljavanja odraslih kroz zakonsku regu-

lativu i uspostavljanje standarda obrazovanja. Čini nam se da postoji kontradikcija u ostvarivanju ciljeva strategije, jer da bi se postiglo unapređenje dostupnosti obrazovanja odraslih i participacija socijalnih partnera neophodno je obezbediti predulsovi, a to je razvijanje demokratskih odnosa i decentralizacija vlasti. Očigledno je da se za razliku od Danske i Velike Britanije Srbija bavi uspostavljanjem „sistema“ obrazovanja odraslih, odnosno započinje svoje prve korake na putu ka željenoj sinhronizaciji sa EU.

Zaključna razmatranja

Na osnovu navedenog možemo zaključiti da Evropska unija i te kako predstavlja referentni okvir kada je reč o postavljanju ciljeva strategija doživotnog učenja. Sve tri zemlje, Danska, Velika Britanija i Srbija, ističu dve dimenzije doživotnog učenja od kojih se jedna odnosi na ekonomski razvoj i konkurentnost, a druga podrazumeva „humanističko-građanske“ (Medić i Popović, 2007) ciljeve. Moglo bi se pretpostaviti da orijentisanost na jedne ili na druge zavisi od ekonomskog razvoja zemlje, odnosno da se ulaganje u lični razvoj može posmatrati kao luksuz koji je dozvoljen tek kada se postigne određeni socio-ekonomski standard. Međutim, ova pretpostavka je neopravdana, jer Srbija i Danska insistiraju na ekonomskoj funkciji obrazovanja, što u slučaju Srbije predstavlja „rešenje ključnih socijalnih i ekonomskih problema“ (Vlada Republike Srbije, 2006: 6), dok Danska doživotno učenje vidi kao instrument „održavanja svoje pozicije kao jedne od najbogatijih zemalja na svetu“ (Ministarstvo obrazovanja Danske, 2007: 6). Zanimljivo je da Škotska insistira na ciljevima ličnog razvoja i socijalne kohezije, a jedan od mogućih razloga je i multietnicizam koji je dominantan u Velikoj Britaniji. Ono što se može primetiti je da su u osnovi ovih razlika modeli kreiranja politika. Kako je navedeno u ranijem poglavlju model Velike Britanije predstavlja model zasnovan na potražnji (demand led model) i strategije odgovaraju kako potrebama različitih zainteresovanih strana tako i individualnim potrebama pojedinaca. Fokus politike je na omogućavanju pojedinaca i poslodavaca da donesu odluku o pravcu učenja, a država je usmerena na uklanjanje barijera u participaciji i podržavanje, kako je navedeno u strategiji, „strasti za učenjem“. U skladu sa tim definisani su i ključni stejkholderi na koje se ova strategija odnosi: na prvom mestu su ljudi, zatim javno finansirani provajderi i centri za učenje, nacionalna javna tela, poslodavci, profesionalne, volonterske i organizacije lokalne zajednice, sindikati i privatne trening kompanije (Ministarstvo obrazovanja Škotske, 2003). Za razliku od Škotske, Srbija na prvo mesto stavlja državu, zatim navodi poslodavce i zaposlene, privredne i stručne asocijacije, udruženja, naučno-

istraživačke i obrazovne institucije i na kraju pojedince (Vlada Republike Srbije, 2006) samo što nismo sigurni kako i ko zastupa interese pojedinaca. Što se tiče Danske u strategiji se navodi da su za implementaciju neophodni trojni razgovori što uključuje državu i socijalne partnere, odnosno državu, državne agencije, javne provajdere, nevladine organizacije uključujući civilne organizacije, komercijalne provajdere i potencijalne učenike i njihove predstavnike (Keogh, 2009). Iako se navode slični socijalni partneri ne možemo zanemariti da u Danskoj postoji duga istorija ovakvog načina kreiranja politika, dok je u Srbiji socijalno partnerstvo slabo razvijeno, mogli bismo reći i zato što su i interesne strane nejednako razvijene. Da li zaista možemo da tvrdimo da će država izaći u susret obrazovnim organizacijama, a kamoli pojedincima? Pitanje je da li postoje mehanizmi koji ovo ostvaruju? Čini nam se da je odgovor na ovo pitanje još uvek ne. Interesantno je da kada se posmatra sistem obrazovanja odraslih, odnosno bolje rečeno ono što se zaista dešava u realnosti, čini se da postoji raznovrsnost u pristupima, ciljevima i provajderima. Ipak, deluje da država putem različitih mehanizama teži da reguliše ono što postoji i na neki način drži pod kontrolom. Ovo se može primetiti i u strategiji jer je veći deo odgovornosti u rukama Ministarstva prosvete. Izgleda da modeli kreiranja politike i status prema Evropskoj uniji više oblikuje ciljeve doživotnog učenja od same socio-ekonomske situacije u zemlji.

U svakom slučaju, dominantan argument za implementaciju strategija doživotnog učenja predstavlja razvoj konkurentnosti, odnosno ekonomski razvoj, a socijalna inkluzija se u slučaju Danske i Srbije razrešava zapošljavanjem. Autori Schuller i Watson (2009) ističu da doživotno učenje nije samo po sebi rešenje strukturalne nejednakosti i može čak da poveća polarizaciju između različitih slojeva, jer oni sa visokim obrazovanjem nastavljaju više da participiraju u obrazovanju u odnosu na one sa niskim inicijalnim obrazovanjem. Povratno obrazovanje se vidi kao moguće rešenje, međutim poznato je da postoji problem sa motivacijom i izrazitom teškoćom u prevazilaženju barijera polaznika. Dilema je, a možda i odgovor da je potrebno objediniti tri kapitala: ljudski kapital, socijalni kapital i lični identitet (Schuller i Watson, 2009), koji predstavljaju vrednost kako za individuu tako i za društvo. Prema pomenutim autorima ljudski kapital čine veštine i kvalifikacije, socijalni se odnosi na participaciju u mrežama koje dele slične vrednosti, a lični identitet je sposobnost da se održi zdravo samopoštovanje i osećaj značaja i smisla u životu. Iako to nije na taj način istaknuto u danskoj nacionalnoj strategiji doživotnog učenja u Nordijskom think tank nalazimo da obrazovanje odraslih mora sistematično da kreira uslove u kojima će ljudi moći da produbljuju samosvesnost i da ojačaju svoje samopoštovanje, jer to čini osnovu za dalji razvoj kompetencija. Čini nam se da čak i ovde velike reči kao što su samosvesnost i samopoštovanje predstavljaju samo način dolaženja do cilja koji je

konkurentnost nordijskih zemalja, a možda je to samo argument za potencijalno ulaganje? Moglo bi se reći da dansko zaboravljanje na lični razvoj i socijalnu inkluziju u strategiji proističe iz uticaja Evropske komisije na definisanje prioriteta, gde je ipak konkurentnost na tržištu “najveća reč”. Ne smemo zaboraviti da je Evropska unija prvobitno ekonomska zajednica i mislimo da ne smemo nekritički da podrazumevamo dominaciju instrumentalne ekonomske funkcije učenja, već je moramo staviti u kontekst i kroz različite diskurse promišljati. Svakako, i sama Unija ističe značaj ličnog razvoja i socijalne inkluzije. Međutim, kao što je već naznačeno to je često na nivou retorike, a ne implementacije. Ipak, ne odustajući od optimističnog pogleda čini nam se da postoji sve veće uvažavanje holističkog pristupa doživotnom učenju, koje je i ilustrovano u Delorovom izveštaju: učenje da se zna, učenje da se radi, učenje da se živi zajedno i učenje da se bude, s tim što učenje da se bude nije samo uslov ostvarivanja učenja da se bude konkurentan na tržištu već predstavlja cilj sam za sebe.

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Lifelong Learning Policy in Europe: EU, Scotland, Denmark and Serbia⁴

Abstract: The goal of this paper is to point out to similarities and differences between goals in lifelong learning and adult education strategies of Scotland, Denmark and Serbia in the European Union context. The new direction of comparative research is headed towards multilayer units of analysis that include global, international and micro level of comparison and thus place the accent to chronological analysis of European Union as a supranational creator of educational policies. Results of the analysis have shown that when we look at the policy as a discourse and not as a practice, goals in the strategies are quite aligned and compatible with EU documents related to lifelong learning. Significant differences between goals, besides socio-economic characteristic of the states and their relationship towards EU, are mainly derived from different models of creation and management of educational policies.

Key words: lifelong learning strategies, European Union, models of policy making.

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Difference through Cultural Contexts: Informal Learning in three European Companies

Abstract: The ways in which adults' education and learning processes have been studied has changed radically in the last decades. For a long time there has been an idea that learning and teaching take place formally, in fixed locations and at fixed times. This paper is based on an intercultural comparative study. It studies the managers' subjective perspective on learning in their workplaces in Germany, Great Britain and Spain. The research question of the study is: how does informal learning vary in diverse cultural contexts? The paper focuses on the contexts in which the informal learning of the managers happens: which contexts do they value as supportive? Which people, structures, time and ideals do they value as important for their subjective informal learning? The results of the study refute the assumption that informal learning happens chaotically and in an unstructured way. It questions the European approach to informal learning and the way of comparing adult learning in Europe.

Key words: informal learning, comparative adult education, learning in the workplace, intercultural adult education.

Introduction

The ways in which adults' learning and education processes have been studied has radically changed in the last decades. For a long time the idea has been that learning primarily takes place formally, in fixed locations and at specific times. The focus has been on adult learning which happened in the presence of a teacher. Looking at more subjective oriented concepts of learning, the focus was on more diverse adult learning offers and possibilities. Learning also happens

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outside educational settings. If we look at European Policy on informal learning, we find a discussion of what informal learning is not: it seems to be outside institutions, without a teacher etc. It seems that research is based on a hypothesis that informal learning ‘just happens’ if there are enough offers and possibilities. Informal learning seems to be chaotic and unstructured. There is little discussion about the influence of the cultural context for informal learning.

This paper is based on an intercultural comparative study (Egetenmeyer, 2008). It studies managers’ subjective perspectives on learning in their workplaces. The research question of the study is: how does informal learning differ in diverse cultural contexts? For this question three case studies in Germany, Great Britain and Spain were carried out. Through this, internal structures of informal learning have been identified. They depend on the context in which informal learning happens.

In this paper I focus on the context in which the informal learning of the managers happens: which context do they value as supportive? Which people, structures, time and ideals do they value as positive for their subjective informal learning? Firstly, I focus on the discourse in adult education around informal learning. Secondly, I present the research design of the study. Then I show the differences between the resources for informal learning in the three case studies. Finally, I identify the characteristics of informal learning in the three contexts studied.

Informal learning

Discussion on informal learning

In the German discussion, informal learning was long characterized by what it was not, i.e. unplanned, unorganised, or subconscious. Schöpfthaler (1981) coined the term ‘residual category’ for informal learning. Dohmen (1999, p 25) defines informal learning as ‘...unplanned and non institutionalised learning in all aspects of life...’ and as a ‘...natural type of human learning...’². He formulates the main characteristics of informal learning as, ‘...immediate in everyday life...’, ‘...determined by a reason – incidental – sporadic...’, as well as ‘...holistic – problem oriented...’³. This understanding of informal learning limits the awareness of informal learning. The terminology for empirical research is

² Translated by R.E., original: nicht planmäßig organisiertes und nicht institutionalisiertes Lernen im Lebensvollzug, natürliches Grundform menschlichen Lebens (Dohmen 1999, p 25)

³ Translated by R.E., original: unmittelbar im Lebensalltag, anlassbedingt – zufällig – sporadisch, unbewusst – beiläufig, ganzheitlich – problembewusst (Dohmen 1999, p 25)

missing. Informal learning that happens in organised or institutionalised education is likely to be excluded from the empirical research (see also Dugid, Slade & Schugurensky 2006; Aberton 2008).

Similar to British authors (Marsick & Watkins 2001), authors in Germany focus on the context of informal learning. Straka (2000; 2001, p 56) has studied 'learning in informal environmental conditions'. Through this it is possible to talk about learning in an informal context.

This contextual understanding of informal learning is the basis of several current studies. Studies using surveys typically ask for the context as well as the resources people use for informal learning. The Canadian NALL-Study (Livingstone 2000) studied informal learning by asking about learning activities in different learning contexts: 'employment', 'community volunteer work', 'household work' and 'other general interest'. Schiersmann (2006) has asked in her survey for 'work-based learning', 'learning in the community and in private' and 'learning through the media'. Kuwan/Schmidt/Tippelt (2009) studied elderly people's informal learning and asked about 'reading activities', 'computer and internet use', 'TV, radio and video use', 'family, friends and colleagues', 'museums' as well as 'libraries and learning centres'. In most of these studies it seems that informal learning 'just happens' in a chaotic and unstructured way if the context offers enough options and possibilities.

The Adult Education Survey (European Commission 2005) included informal learning. It studied informal learning by investigating the use of specific resources for informal learning: 'Learning from printed materials', 'Learning from computers', 'Learning from family members, friends, colleagues', 'Learning from tv/radio/video', 'Learning from guided tours of museums, historical/industrial sites', and 'Learning in learning centres (including libraries)'.

In all of these studies there is almost no discussion on how informal learning differs in different European contexts.

Terminological Basis

The following European Union definition has been the basis for this research:

Informal learning is a natural accompaniment to everyday life. Unlike formal and nonformal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills. (European Commission 2000, p 8)

The research presented here has been designed as an interview study. Consequently, the research could only focus on the informal learning experiences that the interviewees could articulate.

For a terminological basis, positive criteria of informal learning were developed. In the study this acted as a heuristic model. Informal learning is understood as a subjective learning activity which is influenced in a specific way by its context. The companies form a specific context for informal learning. They influence different aspects of informal learning.

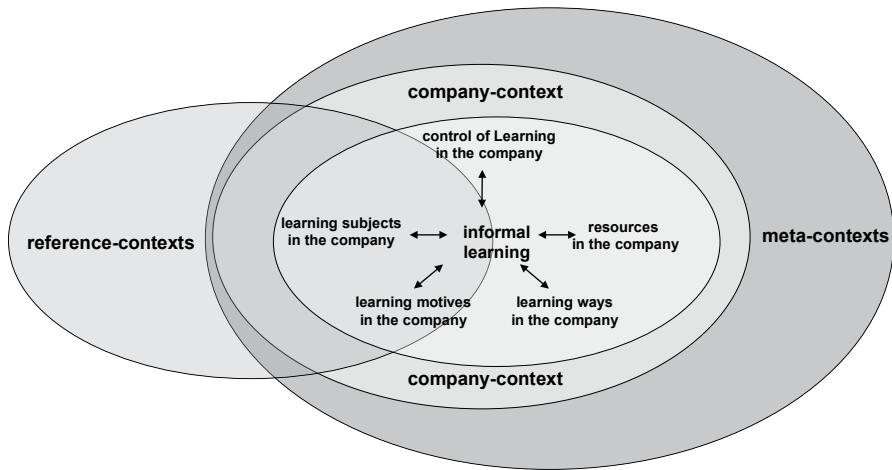


Figure 1: Informal learning as ways of learning within a company
Source: according to Egetenmeyer (2008, p 18)

The assumption of the study is that companies operate in different contexts which influence the informal learning that takes place. Regional and national contexts create meta-contexts into which the company contexts integrate. There are other reference-contexts, e.g. customers, into which the company-context is only partly integrated.

The operationalisation of the term informal learning was focused on the following five aspects:

- Learning subjects: which subjects and topics do people learn informally?
- Learning motives: what motivates people to learn informally? Which situations lead to informal learning?

- Ways of learning: how do people learn informally? Which ways and form of acquirement do they use?
- Resources: which media, people, structures and temporal resources do people see as helpful for their informal learning?
- Informal learning control: how is informal learning assessed? Is there any kind of control over the results of the informal learning processes?

Research Design

The research on informal learning in companies looked at their learning cultures. I therefore did a review of German literature on learning cultures and developed an analysis-instrument. The following aspects of company's learning cultures have been studied: (1) staff learning behaviours (subjects studied, motivation for learning, learning methods, resources, informal learning control), (2) structures and instruments provided by the company (resources, support), (3) company's learning philosophy, (4) perspectives about learning in the company.

To find out about the cultural differences in informal learning, an intercultural comparative study was designed to study the informal learning of managers in three companies in Germany, Great Britain and Spain (Egetenmeyer 2008). In 2005 19 semi-structured (ethno methodological) interviews were carried out in German and English in three similar firms. The three firms build and sell drive systems for the car, ship and train industry, industrial industry. All the firms belonged to one affiliated group, located in Germany, but each had a lot of independence, especially in human resources. As the machines were mainly developed and produced in Germany, and sold in Spain and Great Britain, I included in the German sample managers who had comparable tasks and responsibilities to the managers in Spain and Great Britain.

The interviewees were managers and people responsible for Human Resource Management (in the following called Human Resource Managers). Based on an understanding of learning which is subject specific, the firms' learning cultures were studied through the description of the subjective learning behaviours of the managers on one side, and the strategies of the Human Resource Managers on the other. In each firm four managers and two to three Human Resource Managers were interviewed.

In the comparative content analysis of all interviews, the differences in informal learning between the three learning cultures were analysed. The analysis identified both similarities in the instances of informal learning in each firm as well as differences between the three firms. These were found in the informal

learning subjects, the motivation for informal learning, the informal learning methods, the resources for informal learning and the control of informal learning.

Within the limited space of this paper, the comparison will focus on the resources which the managers used for informal learning. The study was done by a single researcher from Germany and therefore the analysis is seen from a German perspective. The study focuses on the managers, so it is also helpful to keep in mind that in the analysis the focus is on a specific group of 'informal learners'.

Resources for informal learning

In the interview, several resources were found. These were described as potential for informal learning. Beside the organisational structure of a company, the managers perceived attitudes towards informal learning as important resources. In the following I distinguish between personal, structural, temporal and ideational resources.

Personal Resources

The interviewees mentioned several people who supported informal learning in their work. People who can give advice, can answer questions or can show them new ways to learn. In the context of an enterprise, there are several people who can act as a personal resource, e.g. supervisors, colleagues or experienced staff.

The German managers named several people they used to support their informal learning: supervisors act as role models or as supporters, e.g. through feedback.

..my supervisors have shaped and influenced and promoted me most. There I have learned most. (D5-FK, 19)⁴

Predecessors and more experienced colleagues acted as senior experts. Peers were used for personal interactions. Direct reports gave feedback. The German interviewees showed that they used various people to give different perspectives for their informal learning. Different people acted as personal resources depending on their roles and experience. The interviewees identified differences in the roles of their supervisor and other colleagues. Whereas supervisors were a resource because of their position, colleagues were a resource because of their individual experiences.

⁴ Translated by R.E., original: ...haben mich meine Vorgesetzten am stärksten geprägt und beeinflusst und gefördert. Und dort habe ich auch am meisten gelernt

The British managers identified their supervisors as advisors and supporters. Their colleagues acted as discussion partners, senior experts or as special experts.

...if I have a problem with something and I am struggling to find a solution, I can discuss it with him (supervisor, R.E.), but at the end of it, he will always say to me: What do you think you should do? He will not force me this way or that way and will allow me to be in control of that. (GB3-FK, 73)

The interviewees described having an interactive role with their supervisor. This means that their supervisor actively encouraged their informal learning. They describe peers taking a similarly active role as a personal resource for informal learning.

In the Spanish company the following personal resources were identified in the interviews: supervisors acted as promoters, colleagues as responsible people and peers as senior experts. Typically, in the Spanish company the managers identified people whose role included acting as a support for colleagues, as personal resources for informal learning.

But if I don't know who is the correct person to answer my question, I have to call the area manager, and if he cannot answer, he will look for the answer in Germany. (ES3-PE, 116)

you have the boss of the product group and he can try to help you. (ES2-PE, 51)

This means that people with that specific responsibility are identified as personal resources. This indicates a responsible-oriented character for personal resources in the Spanish company studied.

In summary, German interviewees used various colleagues in a heuristic way as personal resources. They name different people as possibilities for supporting informal learning. This indicates that they then use different perspectives on a subject. That makes it possible to have a diverse perspective on a subject and supports a knowledge-oriented approach to informal learning. The British interviewees used specific people for their informal learning activities. They mainly describe sharing experience with supervisors or peers. In the Spanish company they describe personal contacts with people with specific knowledge or abilities as resources. The company structures identify people who are responsible for different topics. These people with responsibilities act as personal resources.

Structural Resources

Structural resources mean the internal organisation of a company which makes informal learning possible or which constrain informal learning. Interna-

tional structures as well as organisational aspects, are part of structural resources: working methods, agreements or instructions.

In the German company the following structural resources support informal learning: appraisal interviews, a broad literature offer, access to information technology, networks, organisational aspects and company growth.

The structural resources found in the German company interviews are distinguished by their enabling characteristics. This means that the interviewees described resource possibilities for informal learning.

Literature resources are provided, ... library resp. organized distribution of magazines ... is a library for us. There are resources available ... which are available individually, if you subscribe to the distribution, if you are interested in. (D3-PE, 55)⁵

Access to the intranet which is here designed in direction of a knowledge database. ... you get of course information through the intranet. (D3-PE, 53)⁶

The structural resources were described by the interviewees as having a heuristic character. The description was more focused on the potential of the resources, how they were used depended on the individual learner.

In the British company the following structural resources could be identified: appraisal interviews, specific publications, in-house experts, regular team meetings as well as cooperation with German colleagues.

For example the lady we just employed, I need her to understand the manufacturing side of business quickly. So I said to her: in one or two months, I want you to go and spend two days with the production people so you learn what they do. (GB2-PE, 87)

A function-orientation could be identified in the structural resources of the British company. This means that each structural resource has a specific function. Structural resources get by this their value through the specific function..

In the interviews with the Spanish managers, the following structural resources were identified: intranet, the organisation of the company, responsible people, membership of an international concern, regular team meetings as well as the coffee machine as a central meeting point. The structural resources in the Spanish company have an orientation-character. They are characterized by specific responsibilities and an organisational framework which provides guidance.

⁵ Translated by R.E., original: Da werden also Literatur-Ressourcen zur Verfügung gestellt, ... Fachbücherei bzw. Umläufe von Zeitschriften, ... die dann durch Umläufe gehen und damit dem Einzelnen zur Verfügung stehen und man kann sich auf den Verteiler setzen, wenn einen das interessiert.

⁶ Translated by R.E., original: Zugang zu Intranet, was ja hier ein Stückchen Richtung Wissensdatenbank ... aufgebaut ist. ...wo ... man dann natürlich auch die Information bekommt im Intranet.

You have here ... a General Manager. You have a Rep [Responsible Person, R. E.] for administration and controlling. The Rep knows the customers, knows the relation. He can also teach these persons a lot about customers etc, etc. (ES2-PE, 64)

The structure helps the individual find support for their informal learning as it is clear who is responsible for each single question. Further characteristics of structural resources are personal relationships and a good environment for personal interaction.

Here in Spain, it's very usual to have only one coffee machine for all the different departments. (...) Usually the people of the tie (white collars, R.E.) don't have contact with the people of the workshop (blue collars, R.E.). (...) all the people must go to the workshop. And have contact with the people of the workshop. (ES2-PE, 122–124)

In summary, the German managers interviewed use structural resources to get several perspectives on a topic. They identified a possibility for informal learning as learning from colleagues who had different work experiences. Furthermore, they also described having open access to publications as a support for informal learning. In contrast, the British managers saw explicitly selected publications or a specific knowledge exchange as supportive, which points to a goal-oriented approach. The Spanish managers referred to the organisational structure through which they could contact people with similar tasks. A specific form of guidance is available in the Spanish company. This guidance can help employees to integrate themselves into the company. Furthermore the structure gives them a specific possibility for informal learning.

Temporal Resources

Informal learning is often integrated in working tasks. Nevertheless, learning also needs time of its own. Under temporal resources, we include all of the conditions which the company or individuals create to enable them to have time for informal learning.

In the interviews with the German managers we can identify temporal resources such as, working time on trust, an induction and the availability of temporal independence.

We need engineers or we need employees, who also, perhaps an over exaggeration, go over the next horizon and pick out an idea from the next flower. Yes,

this is possible at [name of the company]. This is possible. Because everybody has the time and freedom. (D6-FK, 93)⁷

This indicates that the interviewees used the independence in their day to day work as a temporal resource for informal learning. This indicates the enabling character of the learning processes and personal responsibility for learning activities.

In the British company time for exchange of knowledge as well as the possibility to set one's own priorities could be identified as a temporal resource.

We would generally do it through our own facilities of internal training: who can show you how to do that? Go and spend half a day with them. (GB2-PE, 87)

In the interviews indications could be found which showed that temporal resources were created for a specific purpose. This shows goal-orientation as a characteristic of temporal resources.

In the interviews with the Spanish managers, references which point directly to the use of temporal resources for informal learning were not found. Several references which point indirectly to temporal resources were times provided for training or workshops. In addition, the coffee machine that was mentioned also supports informal exchange among colleagues in the company. The open culture of discussion described in the Spanish company is an example of temporal resources. Managers can take time to explain issues or answer questions. Through this, structural and ideational resources in the Spanish company provide temporal resources for informal learning.

In summary, in the German company we can identify independence as a temporal resource. This allows for individual methods of learning. In the interviews in the British company, we observed a goal-orientation. In the Spanish company the aspect of belonging to the organisation plays an important role.

Ideational Resources

Ideational resources are attitudes in the companies concerning the professional and personal continuing development of the employees. Ideational resources can be understood as values or cultural aspects in the companies which support informal learning.

⁷ Translated by R.E., original: Wir brauchen Ingenieure oder wir brauchen Mitarbeiter, die auch mal, jetzt krass, über eine Wiese gehen und aus der nächsten Blume eine Idee ziehen. Ja, und das geht beim N.N.. Das geht. Weil die Zeit und den Freiraum hat jeder.

In the German company, the following ideational resources could be identified: a willingness to delegate broad responsibilities, patience, acceptance that mistakes happen, and collegiality.

The interviews indicated that ideational resources created a positive environment for informal learning. The interviewees describe resources which make emotional informal learning possible.

...allows you to solve unconventional tasks and to establish independence, if one just has the courage and the readiness to take on responsibility (D2-PE, 19)⁸

There is a lot of patience. ... I still can say: I have not been here long, please explain it to me, what do you think. Or: What do I have to do? (D6-FK, 33)⁹

That I allow mistakes, that people can skate on thin ice ... (D5-FK, 81)¹⁰

In the British company broad responsibility, filling jobs internally and collegiality can be identified as ideational resources for informal learning. The ideational resources described are goal-orientated. The first two ideational resources are ways of motivating informal learning.

You obviously have a track record that you can achieve, providing you show a desire and a willingness to move forward. But that door is always available. I think certainly for me personally, if anybody really, if they have the drive and commitment to take opportunities and learn new experiences, then [name of the company] will give you that opportunity, absolutely. (GB3-FK, 65)

The collegiate attitude could be an indication of a common responsibility for the success of the company. Beside this, managers refer to the fact that it depends on the employees' willingness to take part in informal learning activities.

In the interviews with the Spanish managers, the following ideational resources could be identified: trust, which they got by having new responsibilities, a culture of open discussion, as well as a supportive attitude towards the learning interests of the staff.

For example, he gives me a new responsibility, the responsibility to control the marketing in Mauritania. If he gives me this responsibility, this means that he trusts me, and with this I will be able to improve my commercial capability. (ES3-FK, 102)

⁸ Translated by R.E., original: ...unkonventionelle Aufgaben lösen darf und einen sehr großen Freiheitsspielraum sich erarbeiten kann, wenn man eben einfach, den Mut und die Verantwortungsbereitschaft dazu mitbringt.

⁹ Translated by R.E., original: Also da herrscht hier eine sehr große Geduld. Ich habe also lange Zeit und das kann ich zum Teil immer noch machen, sagen: Ich bin noch nicht so lange dabei, erklärt mir, was ihr meint. Oder: Was muss ich tun?

¹⁰ Translated by R.E., original: Dass ich Fehler zulasse, dass die Leute sich auch mal auf dünnes Eis begeben können ...

The ideational resources in the Spanish company are about providing for learning possibilities. It is up to the staff to use them. Beside this, friendly relationships with colleagues were described as important.

In summary, in the German interviews the importance of having independence for individual learning could be found. Internal promotion in the British firm indicates that people are supported to reach an internal goal. In the Spanish company the culture of open discussion is important and being able to solve problems by contacting colleagues.

Comparison of Resources for Informal Learning

In comparing the resources for informal learning in the three companies, we identified differences concerning character, function and context.

	German Company	British Company	Spanish Company
Character	heuristic	function-oriented	responsibility-oriented
Function	enabling informal learning	supporting a specific target	giving guidance
Context	independence	company targets	collegial relationship

Figure 2: Comparison of resources in informal learning
Source: author's own (according to Egetenmeyer 2008)

While the resources identified in the German company indicate a heuristic approach to informal learning, the resources identified in the British company indicate a function-oriented approach. The resources identified in the Spanish company are characterized by specific responsibilities which support informal learning.

We can see these differences if we take a closer look at the personal resources. The German interviewees name various people, each of whom they use in different ways to support informal learning. This shows that people are available and enable informal learning. Further, independence as a context condition is seen as a supportive factor by the managers. It puts the choice of resources into the hands of the learners.

The idea of a function-orientated approach to informal learning taken by the British managers is supported by the choice of supervisors and colleagues as personal resources. The primary characteristic of these resources is that they contribute to the company's success. Transparent targets are necessary if a function-oriented approach to resources is taken. These were seen in the British company studied.

In the Spanish company people with a specific responsibility are used for informal learning. Their function is to give guidance to colleagues. A characteristic of the way personal resources are used is a collegial relationship which makes the resources easier to access..

Conclusion

How can these results be interpreted? There is of course no doubt that there are strong organisational influences on the informal learning of managers. Surely differences between informal learning can be found, if three different companies in one country are studied. The study focuses only on the informal learning of managers in these companies. It does not intend to present the whole learning culture of the three companies.

The results show that informal learning depends on concrete resources in a personal, structural, temporal and ideational manner. Informal learning does not just happen. It depends on the resources which are available. Furthermore, the study shows that managers in different companies value different resources, although overall similar resources are available in the three companies. In the companies, a similar approach to how and which resources are used could be identified.

The different approaches to informal learning in the three companies studied indicates a similarity between the three approaches to learning and the educational traditions of each national context. In the informal learning of the German managers, references to German educational philosophy could be found. The heuristic character of the learning resources, which enable learning, demonstrate an understanding of open learning shaped by a subjective oriented educational philosophy of an all-round educated human being. Independence seems to be an important context for the German managers.

Everyone should have access to education at any time and in any place. By this, the German interviewees indicate the importance of enabling learning and having freedom in their learning processes. Furthermore, understanding plays

an important role. This reflects the ideas of the German educational philosophy according to Humboldt.

You can also find the presence of British characteristics: goal-orientation, systematic and functional methods of informal learning. This understanding indicates an educational system directed towards goals and examinations. This reflects the British education system with its orientation towards goals and benchmarking and where a good examination result can be seen as the goal itself.

Reflections of the Spanish education system can also be seen in the Spanish characteristics: adult education in Spain developed from creating educational access for workers and migrants. The focus was on integration. You can also find this integration approach in the Spanish interviews in the study.

The study refutes the assumption that informal learning is unstructured. It provides instead indications that informal learning follows hidden rules which differ according to the context. An inherent structure of informal learning which is influenced by its cultural context could be seen. Although there are similar resources for informal learning available in the three companies, the managers identified different ways of using the resources. These results show hidden rules in informal learning. It shows that there are differences in informal learning in companies in different European countries and it also shows that approaches to informal learning are close to the educational philosophies of the countries. The results, therefore, give us a reason to ask, is it really the same, if we talk about informal learning in different contexts. What consequences would it have at an international level, if we talk about strategies and targets which affect informal learning, e.g. recognition or accreditation of informal learning? What would these results mean for a fair formulation of European benchmarks or surveys which focus on informal learning?

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Razlike koje se javljaju u kulturnim kontekstima: informalno učenje u tri evropske kompanije

Apstrakt: Načini na koje se istraživalo obrazovanje i procesi učenja radikalno su se promenili u poslednjih deset godina. Dugo vremena je postojala ideja da se učenje i podučavanje odvija isključivo formalno, na određenim lokacijama i u određenom vremenu. Ovaj rad predstavlja komparativnu interkulturalnu studiju i istražuje subjektivnu perspektivu učenja menadžera na njihovom radnom mestu u Nemačkoj, Velikoj Britaniji i Španiji. Istraživačko pitanje studije je kako informalno učenje varira u različitim kulturnim kontekstima. U ovom radu, kontekst u kome se dešava informalno učenje menadžera je sledeći: koji kontekst oni procenjuju kao podršku? Koje osobe, strukture, vremenske okvire i ideale oni procenjuju kao pozitivne za njihovo subjektivno informalno učenje? Rezultati ove studije pobijaju pretpostavku da se informalno učenje odigrava na haotičan i nestrukturiran način. Ona preispituje evropski način odnosa prema informalnom učenju i načine upoređivanja učenja odraslih u Evropi.

Ključne reči: informalno učenje, komparativno obrazovanje odraslih, učenje na radnom mestu, interkulturalno obrazovanje odraslih.

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Abstract: In order to successfully promote and sustain the magnitude of leadership in educational organisations and to appreciate the complexity of this role within the organisational structures and its diverse models, the theoretical concepts of this phenomenon must be fully understood by people who are delegated with this responsibility. However, given the changing pluralistic disposition of society in which educational institution operates, call for a more radical thinking behind the art of leadership, leadership roles and how they are implemented and managed in the organisations. This paper concentrates on the importance and the intricacy of leadership roles within an educational organisation. It examines the application leadership hypothesis from a theoretical and practical view point and discusses through a case study the effect of distinctive styles of leadership performance, strength, weakness and the impact it has on staff development, self esteem and mental health and wellbeing. The paper concludes with key successful thoughts of an expert leadership roles within an educational setting.

Key words: leadership, globalisation, transformation, learning environment.

Introduction

Educational Leadership refers to the leadership that provides direction and expert or development of learning, teaching curriculum, emphasises relevant to education in Management diagnosis problems and encourage professional development and teaching improvement. (Bush and Bell, 2002)

Many academics have written extensively on the theme of leadership and its theoretical and realistic role in educational organisation. The above quotation serves to remind educators that leadership is about identifying and providing guidance in academic development, conducting establishment portfolio of educational services and to implement strategies to improve organisation perfor-

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mance in the educational environment. Robertson (2009) expound that educational leaders are leaders who no matter what level in the institution, focus on improving learning opportunities as their main function and work to develop their own educational leadership capacity and that of their institution. In addition, Dimmock and Walker (2005) see education leadership as a 'socially bound process'. These processes are integrated within fluid factors such as culture, politics, moral, values, ethics and religious or spiritual issues in humanity. The educational leader should fully comprehend these variables and the impact they have on the organisational ability to perform and apply them to improve organisation efficiency and to be an effective educational provider. These changeable themes are permeated throughout the complete organisational structure, from a strategic, functional, operational or unit's perspective.

Within these structures and diversified roles, Tomlinson (2004) noted that leadership is about inspiring and winning commitment. Also leadership is more about personal authenticity and at times recognising personal fundamental flaws which limit leadership capacity. Furthermore, Davies and West-Burnham (2003) elucidate that leadership is spiritually purposeful and must be value driven in order to accomplish purposeful learning amongst participants. The authors suggested that the process of leadership must provide and provoke us in to new actions to challenge old assumptions about who can learn, how and why. Such provocation is initiated through inquiry, reflection, dialogue and focus on results. More to the point Bennett (1994) voiced that leadership is a 'sophisticated concept with as many definitions as people who have attempted to define it as for example, a focus of group process, personality and its effect, the art of inducing compliance and exercise in influence, act of behaviour, a form of persuasion, power relationship, an instrument of goal achievement and a way of defining an individual role'. On one hand, the above arguments from the writers, bequeath an unambiguous indication on the authentic nature and complexity of leadership roles in educational organisation. While on the other hand, such byzantine leadership roles within the educational institution embraces various organisation activities personified in a social structural sphere of power, authority and morality, styles of management, bureaucratic or democratic structures, sensitivity, organisation vision, missions, objectives, products or curriculum, staff and student population, cultural, socio- behavioural demeanour and accomplishments.

External environment factors such as globalisation, pluralistic society, technology in teaching and learning has had a significant effect on how the leaders execute their leadership role within the establishment, achieve organisation goals and to remain competitive in the educational market environment in which they operate. An educational leader consequently needs to have the skills, knowledge,

attitude, habits and competency to absolutely manage, direct, motivate and influences those individuals and teams who are delegated with various tasks and responsibilities in an educational setting. From this perspective, effective leadership means being aware of the internal organisation factors that can have an impact on students and staff performances and how to use plan tactics to overcome issues in the teaching and learning environment. As noted in the diagram (F1) below, internal pressures can have a significant consequence on the performance of the leaders who are not up to date on the contributory agents that can affect productivity, performance and moral of staff and students in the teaching and learning milieu.



Diagram F1: Examples of internal organisation factors and their effects leadership in education

For example, leaders are accountable and responsible for creating the affirmative organisational culture. Observation from Kefela (2010) defined organisational culture as basically a system of shared beliefs that members of the organisation have, which determines how members in an organisation act when confronted with decision-making responsibilities. Additionally, Jarvis (2005) clarifies culture in organisational terms as broadly the social/behavioural manifestation and experiencing of a whole range of issues such as:

- a. the way work is organised and experienced
- b. how authority is exercised and distributed

- c. how people are and feel rewarded, organised and controlled
- d. the values and work orientation of staff
- e. the degree of formalisation, standardisation and control through systems there are/should be
- f. the value placed on planning, analysis, logic, fairness etc
- g. how much initiative, risk-taking, scope for individuality and expression is given
- h. rules and expectations about such things as informality in interpersonal relations, dress, personal eccentricity etc
- i. differential status
- j. emphasis given to rules, procedures, specifications of performance and results, team or individual working (Jarvis, C, 2005)

Hence, leaders creating an organisational culture need to have a transparent view of what they want to achieve and the strategies they will implement to accomplish educational goals. Anderson (2010) explains that leaders make a diminutive quantity of key decisions about the organisational structure and its staff, and by persistently and precisely informing their approach to everyday business activities with the view that all staff are capable of excellent performance when properly motivated. From this notion being a leader is how one sees their teams as a combined unit or as individuals with a diversity of skills. Such leadership calls for the development of transparent communication strategies, valuing each member of the organisation equally, provide opportunity where staff can engage in development programmes to improve their teaching competences, decision making, evaluating and monitoring skills of student achievements on an educational programme and projects. These expectations and operations must be clearly communicated by the leader in the vision and mission statements of the department or the organisational structure. Factors such as curriculum development, student attrition, collaboration and partnership activities, examination and awarding bodies and their effect on leadership in an education institution for profitability and productivity, should be clearly understood by the teaching and administration workforce. The leader is the key individual who has the task to inform the workforce of the economic importance of these factors within the institutions.

During the process of leading educational strategies for organisational performance, diversification and market positioning in curricula activities, some leaders may experience individual conflicts. Davies and West-Burnham (2003) documented that conflict is an inevitable part of life and can be a basis for change and growth which can be draining and painful. Nevertheless, the leader should

encourage participation, recognise staff efforts, be adaptable and flexible, demonstrate assertiveness, confident and verbally fluent, ambitious, driven and committed when leading organisational responsibilities. Still, Bush and Bell (2002) maintains that the leader should apply the domains of leadership which include affective behaviour, cognition and performance. Expanding on these three factors, the authors theorise that affective performance relates to personal commitment, attraction or charisma at the individual level, team spirit, social attitudinal norms and social intimacy at group level and institutional level. Behavioural performance also covers leadership behaviours including; consideration, initiating structures or management skills practice, for example, planning and supervision while cognitive performance involves looking at understanding ambiguity, building values and beliefs about education and management.

Leadership is not about making clever decisions as noted by Fullan (2007) cited in Miintzberg (2004). It is about energising other people to make good decisions and do the better things. In other words it is about helping people to release positive energy that is naturally within people. Moreover, Fullan (2007) asserts that effective leadership enthuses more than it empowers. It connects more than it controls and demonstrates more than it decides. It does all this by engaging itself above all and consequently others. Leadership in this sense means building shared vision for effective leadership styles. Since the educational organisation is a multi-complex operating environment, leadership roles and styles may vary. At this moment, Jameson and McNay (2007) reminded us that they are over forty eight theories of leadership in an organisation of which some are noted in the table (F2) below.

Table F2: Styles of Leadership in organisation Adopted from (Jameson and McNay (2007))

Authentic Leadership	Fiedler's L PC Theory Leadership	Path goal theory Leadership
Authoritarian Leadership	Four frame work model	Pedagogical Leadership
Autocratic Leadership	Great man theory Leadership	Person- Centred Leadership
Behavioural Leadership	Group Leadership	Post heroic Leadership
Charismatic Leadership	Heroic Leadership	Synergistic Leadership
Coercive Leadership	Institutional Leadership	Self- managed leadership
Cognitive – resource theory	Intellectual Leadership	Servant Leadership
Collective Leadership	Invisible Leadership	Shared Leadership
Community Leadership	Leader member Leadership	Situational Leadership
Consciousness Leadership	Living Leadership	Spiritual Leadership
Contingency Leadership	Managerial Leadership	Strategic Leadership
Creative Leadership	Moral Leadership	Systematic Leadership
Democratic Leadership	Organisation Leadership	Theory X Theory Y Model
Distributed Leadership	Participative Leadership	Toxic Leadership
Creative Leadership	Trait Leadership	Transactional Leadership
Vroon –Jago yetton Model	Visionary leadership	Transformational Leadership

It is well worth mentioning that Leaders in education do not depend on a single style of leadership to be successful or to be an effective leader of people. For this reason, Anderson (2010) remarked that leadership is an art that demands intensive understanding, development and practice across a wide range of essentially interpersonal activities. It is also about applying the different leadership styles paradigms which may include values, moral and ethics to support an academic activity or to solve an organisational problem. Importantly, Adair (1973) further noted that a leader needs to balance the needs of the task, the team and the individual and demonstrate appropriate behaviour and function in line with the need of the situation to be addressed. Moreover, Jameson and McNay (2007) explicates that the leader should communicate clearly and be coherent in influencing others, capable of being people centred and an emotional intelligent leader. Also Busher (2006) cited Holiday (2005) adds that the leaders need to understand colleagues, personal and work related needs and help them to understand the particular culture of their school. A key aspect to this is being emotionally intelligent which West-Burnham (2009) cited Goleman (2006) defined as the authentic range of intuitive behaviour derived from sophisticated self awareness and un-

derstanding of others which facilitate effective social engagement. For instance, specific emotional intelligent behaviour would include empathy, motivation, effective communication, emotional self management and authentic engagement with others. An alternative model of emotional intelligences noted by Goleman (1998) pertinent to the role of a leader includes self awareness, self resolution, motivation, empathy and social skills. In addition, an up to date model of emotional intelligence illustrated by Goleman (2006) showed that the leaders should demonstrate primal empathy, atonement, empathic accuracy, social cognition, synchrony, self presentation, influence and concern. Likewise Stein and Books (2000) emotional intelligence model suggested factors for example intrapersonal, interpersonal, adaptability, stress management and general mood are an important attribute of an emotional intelligent leader. The case study below gives a scenario on a leadership behaviour and performance which has consequence for effective leadership qualities within a team.

AJ is an attractive 25 year old woman who has recently joined Beck Education institute as a senior lecturer Health Promotion Studies. Recently her Manager, Mr W who is a senior authority in the organisation feels that AJ needs to prove her capability before she can be considered as course leader. At staff meetings, Mr W would ignore AJ's contributions in discussion. Tasks would be delegated to her without consultation and providing adequate information for assignment completion. In addition, Mr W's justification for allocating Amy the weekend curriculum supervisor's role was based on the fact that she was single with no real family commitment and the institution needs to develop week end curricular provision for the community. AJ is uncomfortable with her working environment and expressed she feels stressed, de-motivated and to went to seek advice from the personnel department.

(Case 1 Study Vassel, 2009)

The above situation highlighted issues for concern regarding the leadership style in an educational institution. There are serious concerns about the leadership practices and unprofessional conduct of Mr W. For example, concerns are centred on poor communication, delegating, supporting, guidance and counselling, provision of information and resources, negotiation and opportunities for training and development. Also there are worries about gender stereotype, autocratic control, and bullying. These behavioural qualities can have significant impact on AJ's self esteem, self confidence, mental health and wellbeing and attitude toward her role in the organisation and the task to be carried out.

The scenario presented appeal for more than one leadership style to be applied. At least three leadership types may be learnt and put into operation

according Williams (2002) cited Cole (1996) Adoption of suitable leadership styles are important to ensure that staff are motivated, remain enthusiastic and committed to task completion and educational business. Based on the above case study, there is clear evidence that Mr W's leadership style is one of an autocratic or directive nature which concentrates on high task and low relationship focus and the achievement of targets whatever the impact on the person undertaking the work (Hersey and Blanchard, 1977). Likewise, Anderson (2010) put in plain words that this person came to believe leadership confers experience across all disciplines and whose *raison d'être* is action to be seen in the driving seat and to be seen making decisions. Such a leadership is established on ego and will power, and while it can be extensively effective at the individual decision level, will become increasingly distant from the detailed knowledge required to confront a multiplicity of issues.

Furthermore, this style of leading has little scope for contribution, hence the leader in this capacity is the one who plans, organises, directs and allocates resources with the major objective to control and be efficient. Consequently Bennett et al (1994) articulates that the above style of leadership creates opportunities for isolationism and constraint in lack of role definition. Moreover, Jameson and MacNay (2007) opines that direct or authoritarian styles of leading do not seek to capitalise on skills of the work force, nor does it seek to engage with all employees in the organisation and encourage contribution. It is mainly concern with existing duties, function, and tasks to be done as outlined in the strategic and operational plans.

An effective leadership style in the above case study, should involve for example the application of leadership styles such as, transformational, facilitative, democratic or coaching technique to support AJ and the task she has been delegated. For example, in applying the technique of transformational leadership, Bennett (1994) argues that perspective enables a leader to find ways to develop and supervise autonomous individuals rather than depend on exercise cohesion or hierarchical power in the more tradition way. This approach creates an opportunity for revitalising an organisation, defining the need for change, creating new vision and mobilising commitment to the vision. Moreover, Law and Glover (2000) cited Mitchell and Tucker (1992) commented that transformational leadership attempts to satisfy immediate needs, assess motives, and satisfy higher needs through engaging the person with the follower. The latter authors noted that when leaders are engaged in this style they become concerned about gaining overall cooperation and energetic participation and this approach tends to change the feelings, attitude and believes of followers.

Furthermore, it can be debated that transformation leadership cultivates a sense of purpose and meaning to get individuals involved in academic projects for the economic benefit of the institution. It also promotes intellectual debates, shared values and vision for the team and the organisation. In addition, Woods (2005) cited Gronn (1998) affirms that transformational leadership has been most influential in education and seen as comprising four elements which includes, (a) inspirational influences, consisting of motivating subordinates through charisma, (b) individualised consideration (treating subordinates according to their individual needs), (c) intellectual stimulation (exercising influence on thinking and imagination of subordinates) and (d) idealised influence (bringing about subordinates identification with the leaders vision). Moving onto the facilitative leadership technique and applying this approach in the scenario, Mr W, should work in partnership with AJ ensuring that she understands the nature of the task that has been allocated to her and to be more democratic during the delegation process. Facilitative leadership styles can be used to empower AJ with collective ideas thereby providing scope for building a leader and subordinate working relationship. Anderson (2010) points out that it also advocates fairness in decision making, respect, approachability, innovation, personal development and direction as they work together to achieve organisational goals.

Additionally Kydd, etal (2003) assert that it is important to involve people in decision making and as Ambler (2006) put it, (a) facilitative leadership is about making, connecting and helping others make meaning, (b) provide direction without totally taking the reins, (c) balance managing content and process, (d) invite disclosure and feedback to help surface unacknowledged or invisible belief, thoughts and patterns, (e) focus on building the capacity of individuals and groups to accomplish more on their own, now and in the future and (f) operate from a position of restraint. It is very important to note that the facilitator role is to match the suitability of the task that has been delegated and ensure that the right person is capable of completing the task and provide staff development and training, support or resources to complete the task.

In terms of the democratic leadership approach, the aim of the leader is to collate concern, views or opinions on the most effective way of managing a problem. This particular style is very useful when there are no transparent strategies to manage a problem or the course of action is unclear. Wood (2005) cited Grace (1995) voiced that democratic leadership styles enable leaders to cope better with 'complexity and work intensification'. Also this style of leading people increases engagement and self esteem (Cheung and Cheng, 2002), and a willingness to engage, commit, and give their potential to the organization (Gratton, 2004). Besides Woods (2005) believed that the democratic leadership method creates

freedom of expression and exploration through decisional and ethical rationalities in combination with discursive and therapeutic rationalities, encouraging creative space embraced as necessary for human creativity.

In concluding this article, internal and external environmental factors such as worldwide and government policies, community pressures, political, social, environmental, technological, legal issues and funding guidelines of the educational organisation can have an enormous impact on the role and definition of leadership. From this viewpoint, leadership roles cannot be directly confined to the internal business of the educational organisation but to focus directly or indirectly on the external surrounding of the education establishment. Furthermore an effective leader should be one who is capable of maintaining a multi-professional and multifunctional status whereby they are skilled in the art of leadership while simultaneously supporting colleagues through the application of different paradigms of leadership to get the best performance from staff and students. More so, leadership roles call for expertise in collaborative and partnership activities with the institution, communities, being flexible, innovative and analytical and a good inter-cultural and intra-cultural communicator of information that can be used to formulate strategies for teaching, learning and competence building. The leader should be able to transform individual roles within their own operational sphere, providing chances for training and development focussing on subject pedagogy in direct dialogue with potential students, investors and partners. During this process the leader creates opportunities for developing, mentoring and coaching programmes to improve teaching and learning in the establishment to meet a diverse and multicultural workforce.

Leadership means working differently to circumstances or challenges that the institution encounter while attempting to meet the demands of their target market population. It also means removing the barriers of department territorial rights, autocratic leadership practices to a more democratic practice and sharing a vision for good organisational leadership because it provides a focus for co-operation, accountability and responsibility amongst employers, employees and students for learning and development. Given the complexity of leadership in an education organisation, it is vital that leaders stay focused on the business of leading and guiding people, demonstrate principles and values when dealing with organisational issues and use collaborative strategies when disseminating information, building relationships and negotiating and addressing conflicts with the team. The above suggestions can help with addressing poor leadership qualities such as intolerance, selfishness, self-centeredness, manipulation and untrustworthiness amongst colleagues. The educational leaders overall aim is to continue

to look at innovative ways in facilitating the learning process in the institution's population and lead by example in an ever changing educational context.

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Nevel Vassel²

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Menadžment u obrazovanju

Apstrakt: Radi uspješne promocije i održavanja značaja lidera u obrazovnim organizacijama kao i poštovanja kompleksnosti njihove uloge u organizacionim strukturama i njihovim različitim modelima, ljudi kojima su ove odgovornosti delegirane moraju u potpunosti razumeti teorijski koncept ovog fenomena. Međutim, imajući u vidu pluralistički karakter društva u kojima obrazovne institucije funkcionišu, javlja se poziv na radikalnije razmišljanje kada je u pitanju umetnost liderstva, liderske uloge i na koji način se one implementiraju i kako se njima upravlja u organizacijama. Ovaj rad se bavi značajem i kompleksnošću liderske uloge u okviru vaspitno-obrazovne institucije. Ispituje primenu hipoteze liderstva sa teorijskog i praktičnog stanovišta i kroz studiju slučaja raspravlja o efektima različitih liderskih stilova i uticaj koji oni imaju na razvoj, samopoštovanje i mentalno zdravlje zaposlenih.

Ključne reči: liderstvo, globalizacija, transformacija, okruženje za učenje.

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Guidance and Counselling in Adult Education: Example of Slovenia, England and Ireland

Abstract: In most European countries career guidance is in the foreground (especially for the young); educational guidance and counselling to help adults in their education process is often perceived as a 'superstandard' activity and should as such be paid either by the adults themselves or their employers who will benefit from this education. We have ascertained that the offered possibilities for obtaining information or guidance do not ensure equal access to the various target groups. The overview of the counselling and guidance activities in adult education shows that this activity is predominantly oriented into informing and career guidance and that it functions hand in hand with the workforce market. Even though counselling and guidance activities in adult education are relatively well developed in Slovenia this still remains a marginalised area of (adult) education within the educational policy, for it remains systemically and financially unregulated. Numerous European countries (including Slovenia) have noticed a discrepancy between the political starting points as stated in various documents and the actual condition.

Key words: career guidance, educational guidance and counselling, adults.

Introduction

Within education and learning processes adults have different goals and decide to start these processes in all life periods, which means that there should be a diverse offer of various possibilities of guidance and counselling that would suit them all. In politics - in which institutions (such as for instance OECD, European Community and others) play an important role - the main attention is

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focused on career guidance. Do we also need 'independent' counselling and guidance for adults who need help in their education and learning process, accessible within their local environment, on a 'neutral' terrain (outside of the Job Centre, school and similar) to operate independently from the career guidance centres? For comparative reasons we will show how counselling and guidance is developed in certain European countries (Slovenia, England and Northern Ireland).

The importance of guidance and counselling at ensuring adult education and learning

Adult education can take place in institutions for adult and youth education as well as in many other locations and institutions that are not specifically oriented towards education, such as work places, voluntary organisations, libraries, associations, hospitals, various homes and elsewhere. This diversity derives from the various needs adults have in different periods of their lives and is based on their interests, linked to their everyday life and work, and derived from the need to solve problems and the way the individual functions within the community. In accordance to this adult education objectives also do not have a single meaning, but can be divided into at least four blocks.

1. Adult education should reduce the gap in the educational possibilities and obtained knowledge between the various generations and social groups. This can be helped by better access to guidance, prior to the inclusion into the educational process as well as during the process itself.
2. Adult education should increase the possibilities for active participation in the development of the society. This goal is becoming increasingly important as the power of the civil society is diminishing. Informal adult education, especially community and intergenerational education as well as any other education that is not linked to work and employment play an important role in its affirmation.
3. Adult education and training for work or a profession has currently found a new way in which it managed to become a key political factor in the development of the workforce and the economic movements in society. This process has importantly contributed to the fact that adult education has gained a significantly more recognisable role and position in the social, educational and economic policies (Illeris 2004).

4. Adult education should also fulfil the individual's need for knowledge that can result from a lack of primary education or from personal interests and curiosity.

Currently adult education is a highly favoured area in politics, which is reflected by the emphasising of its importance throughout various documents, strategies and political actions; of course the reality is different, for in most European countries adult education is facing the same problems, i.e. insufficient funding, abolishing support for research institutions and being forced to behave as a part of the market economy. With this the most important part within the field, i.e. informal and community education and empowering individuals and groups, is losing on importance. In European politics – in relation to the development of guidance activities – reducing the social exclusion of inhabitants is becoming an increasingly important goal; in this sense we can define social exclusion as the 'process of becoming detached from the organisations and communities of which the society is composed and from the rights and obligations that they embody' (Watts 2001, pg. 158). The concept is multi-dimensional; in its basis it deals with issues as to how could social integration, solidarity and social cohesion in developed industrial societies be influenced through education. These are issues that occupy the experts today and act as a counterweight to the influence of the neoliberal ideologies on the adult education objectives due to which the advisory activities are also becoming important for education, i.e. an important part of ensuring that the individual gets included into society.

The conflict between the utilitarianism advocated by neoliberalism and the ethics of social justice that was already traditionally present in the welfare state is reflected also in the development of guidance and counselling for adults, which favour the development of career and vocational guidance. Today educational activities are predominantly a tool used by the state in order to achieve more efficient employment, global competition and 'flexibility' (Illeris 2004; Olsen 2006). On the level of the needs of the individual an advantage is held by those who understand education as a possibility for their personal promotion and development. The contemporary states should be just to as many people as possible, i.e. the society as a whole, and not focus on the effects of any single group of individuals within the society (Olsen, Codd, O'Neill 2004, pg. 270)².

² This view can also be noticed in the development of the guidance activities in which priority is given to youth who are facing social exclusion.

Why do we need a varied offer of guidance and counselling in adult education?

As an important part in adult education guidance and counselling responds to the various demands and needs of individuals, groups or society as a whole. Thus guidance and counselling in adult education is not merely oriented towards a single narrow goal or purpose, but potentially includes and enables a number of guidance types offered to adults enrolled in an educational process. When specifying the intention we have to take a number of factors into consideration (Jelenc Krašovec, Jelenc 2003, pg. 73):

1. 1. *the various fields in which guidance and counselling in adult education is offered to the individual:*
 - education, learning;
 - work, career and professional path or the professional career of the individual;
 - personality and the personal life path or the personal career.
2. 2. *the goals of guidance and counselling in adult education* are linked to the basic goal, which is to help the individual to successfully bring to an end his education and learning process.
3. 3. *functions that enable efficient achievement of objectives*

Guidance and counselling in adult education, which is developing independently of the work and employment field, has a number of functions: it helps the individual learn about his/her personal characteristics, interests, capabilities, learning habits and motivation; informs him/her as regards the education offer; helps achieve objectives linked to education as well as personal and professional path; removes the various obstacles that appear during the education process (situational, institutional and dispositional obstacles); offers help when using learning and educational technologies and develops methods and techniques for efficient learning; helps at recognition of prior learning; follows the success of the adult as he/she pursues his/her goals.

Adults might need help when they are trying to begin with the education process, when they are organising their education or when they are already learning; adults might need help before they enrol into an educational programme, during the educational process, towards the end of the educational or learning process or even following its completion. The needs of adults for guidance and counselling are thus diversified, which means that the target groups are also diversified.

On the other hand, career and educational guidance and counselling is “profoundly political process” (Watts 1996, pg. 351). As Watts asserts, “it operates as the interface between individual and society, between self and opportunity, between aspiration and realism” (ibid, pg. 351) and influences the allocation of life chances. It means that it can reinforce such inequalities or reduce them. But socio-political focus of guidance and counselling is still not in the interest of the professional research and literature; this might be also the consequence of the fact, that the theoretical basis of professional guidance and counselling practices is more psychological (individual is in the centre) than sociological in nature. Watts continues that “guidance can be a form of social reform” but on the other side it can be “a form of social control” (Watts 1996, pg. 352). This should be the basis for rethinking guidance and counselling practice and its future development.

Legal definitions, concerning guidance and counselling in adult education in Slovenia

In Slovenia there are no sufficient researches from which we could conclude how much and what sort of help would the adults in the education and learning process need. A research on a representative sample of adults was performed in Slovenia in 1987 (Jelenc Z. 1989), and in it almost two thirds of the respondents who stated that they plan to participate in the education process in the future expressed the opinion that they would need help in this process. Most of them stated that they would need help at organising their education process (38%); the least stated they would need help at selecting the programme (17%). In the second Slovene research on the participation of Slovene inhabitants in the adult education process, which took place in 1998 (Mohorčič Špolar et al. 2001), half of the questioned adults expressed the need for help in their education and learning process (Jelenc Krašovec, Jelenc 2003, pg. 16-17). Mainly it is believed that guidance is needed by the young when they are planning their career and professional path; less people believe that adults also need guidance at their learning and education process, at most informing about learning possibilities.

By adopting various political documents Slovenia is obliged to fulfil certain measures that will encourage adult education and training for the needs of work as well as for the needs of personal development and active inclusion into society. Guidance and counselling in adult education is a field that is – in accordance to the adopted education and lifelong learning strategies – understood as an opportunity for increasing the possibility to fulfil the needs of adults for various types of education.

The Resolution on the National Adult Education Programme, adopted in 2004 (ReNPIO 2004), states that developing guidance and counselling for adults plays an important role in the process of motivating adults to learn and obtain education that will aid their professional and career development; it explicitly states that informing and counselling are a part of every educational or learning process. The attention should be focused on the field of labour and employment as well as the individual's personal, social and cultural development. ReNPIO, as passed by the Slovene government, states that education should become a basic value and activity - the effects of which would also be shown in the tolerance and understanding amongst people, the enrichment of tradition and culture, improved functioning of the family as well as the individual. This would also encourage various groups to actively participate in the social sense and not merely as an investment into the economic growth and greater competitiveness in the domestic and global market (Drofenik et al. 1999, pg. 335). At this the functioning and development of local communities or neighbourhoods - in which the appropriate educational offer should develop hand in hand with guidance and counselling activities in adult education - is of extreme importance. One of the activities defined in the *National Programme* as a necessity for the fulfilment of the priority objectives, is to emphasise the development of the guidance and counselling network which would link the providers of education, the workforce market and the representatives of other regional services and public institutions (in the field of agriculture, culture, health care, etc.) (Drofenik et al. 1999, pg. 341).

Article No. 67 of the *Organization and Financing of Education Act* (2003) only defines guidance services in public nursery, primary and secondary schools, at which their activities are aimed at children, apprentices, pupils, their parents and teachers; when performing career guidance it works in union with the Employment Service of Slovenia. Guidance and counselling in adult education is not mentioned by law and is thus left to the local community and the local legislation which is non-obligatory in these issues. Article No. 21 of the *Local Self-Government Act* (1993) merely stipulates that municipalities should encourage educational activities in their area, which is as specific as the act gets.

In the European Commission report entitled '*Adult Learning: it is Never too Late to Learn*' (2006) it was ascertained that within adult education the most neglected groups are adults with the lowest level of education, the elderly, people from rural areas and the disabled. The report also states that this is a consequence of access to good and timely information, as well as social and personal conditions, the influence of which can be reduced through good guidance. EU members state that the key challenge is to ensure equal division in the participation

within adult education, which could be achieved by encouraging and supporting those adults who are the least likely to play a role in the education process.

The overview of the national and international projects for guidance and counselling in lifelong learning and career development in Slovenia during the past ten years shows that the position of guidance and counselling in adult education is marginal (a single project took place within this field). Most projects were performed in the field of guidance and counselling as regards career choice (mostly aimed at pupils, students and youth in general), helping individuals enter the education and work processes (mainly the young, but also representatives of socially deprived groups, for instance refugees) and in the field of innovations in informational-communicational technology, with tendency to reduce the costs of informing and guidance through the use of information technology (Polak 2006). This shows a move away from the basic principles of ensuring a high quality guidance and counselling service for all adults who need help in their learning and education processes.

The development of guidance and counselling in adult education shown on the example of England, Northern Ireland and Slovenia

The development of guidance and counselling in adult education is relatively intense in Slovenia, however such belief can rise over zealous optimism and the feeling of self sufficiency. In order to shed some light on these statements we will briefly present the development of guidance activities in selected European countries.

At the turn of the 20th century the first career guidance services appeared in USA and Europe (Brewer 1942 in Watts, Kidd 2000, pg. 485). In Great Britain where career and educational guidance were first developed the first guidance services were aimed exclusively at the young. Today, Great Britain is host to intensive debates dealing with the gap between the policies and practice and the opposition between career guidance and education guidance and counselling. These debates are obviously dominant all across Europe, for they express the power struggle between politics and the scientific field that is endeavouring to ensure sufficient guidance and counselling possibilities for all adults in need of it.

In the United Kingdom no unified scheme for developing career guidance exists; the development of these services depends on diversified factors, also on the influence of the market within an individual country. The differences between countries as regards the development of guidance and counselling are merely deepening (Watts 2006). In England the emphasis lies on a horizontal integration of guidance services that are divided into those for adults and those for

youths, while in other countries in the United Kingdom (for instance in Northern Ireland and Wales) the emphasis is placed on the vertical integration of guidance services that operate on to the principle of 'different age groups'.

In England one can notice a constant gap between the guidance offer for youth and adults; the career guidance policy for the youth and adults is clearly separated. This gap was defined by the 1973 Employment and Training Act which demanded that the Local Educational Authorities (LEAs) in England and Wales ensure career guidance for youth. At the same time this Act allowed LEAs to offer career guidance also to adults, wherever possibilities permitted (but did not define or finance it). This dualism that distinguished between the obligatory guidance for the youth and the 'permitted' guidance for adults is still in existence today. Mulvey (2006, pg. 14) and Watts & Kidd (2000, pg. 485) estimate this duality to be merely another wrong move, one of the many that seem to be present in the English educational policy. Adult career guidance has – as there was no act that would govern it – developed gradually, with funds intended for various target groups. If it would have a unified and wholesome financing this would ensure an efficient offer for all adults. In the period governed by the 'new right' a clearer market discipline tendency was expressed (Watts 1991, pg. 233), the essence of which was mainly oriented towards efficiency and measurability. The funds for adult guidance were always short-term and dependent on the needs of the employers or the government. Mulvey ascertained that due to the lack of a national policy and the irregular and insecure financing, the structure and network of guidance services is weak; this influences the morals of the counsellors who work with adults. Counsellors have noticed a general lack of realisation as regards the importance of guidance and counselling in adult education, including the generally spread erroneous idea that guidance is only important for young people (Mulvey 2006, pg. 25).

In England guidance offers a whole array of oppositions. The first is the opposition between the young and adults; the second is the question whether the individual belongs into the selected target group that is currently interesting (this holds true for youth as well as for adults). The third opposition deals with inclusion – this is the opposition between those who are not included into education, are not employed and are not in training (regardless of age) and those who are in the education process, are employed and are in training, however their demands for guidance might not be known. Finally, there is the opposition between the politicians and experts (practitioners, researchers) – the first have power, the second the responsibility. Experts in England are of the opinion in order for guidance to be efficient it should be a wholesome activity and represent a connected field.

In Northern Ireland, which is an example of good practice in the fields of developing adult education and guidance activities for adults, the first official career guidance service was established as early as 1948 (McCarty, Millar 2006) and was intended only for the youth who completed their education. Later on these services started to reorganise themselves and were renamed into career centres. The Educational Guidance Service for Adults (EGSA), which appeared in 1967 as an experimental pilot project, was developing parallel to this. At first it was intended as an Adult Vocational Guidance Service and as such it was the first service of the kind (that ensured independent advice and counselling for adults) in the United Kingdom. Because it was discovered that many adults needed guidance and counselling for education more than vocational guidance these centres were renamed into Educational Guidance Service for Adults (EGSA). Today the Educational Guidance Service for Adults (EGSA) is an independent, non-profit organisation that operates in the voluntary sector. It is financed by the Department of Employment and learning as well as the Department of Education in Northern Ireland. They also get additional funds from the European Union. The service has recently developed immensely, which was enabled by adoption of Lifelong Learning strategy document, so that now the network is linked with various education providers, employers and community organisations.

It operates in various places, for instance in community centres, colleges and libraries, which enables to fulfil their mission, with the goal of reaching those adults who would otherwise not seek guidance. EGSA also encourages other organisations to develop their own guidance activities; thus the free telephone guidance 'Learndirect' developed, however this stopped operating after five years of operation (in 2005) when it was cut off from its finances. In Ireland they are also of the opinion that the greatest lack in the current offer of guidance and counselling is the lack of a wholesome policy and a development strategy for the field.

In 2000 Ireland adopted the White Paper on Adult Education in which the need for guidance and counselling in adult education was clearly exposed and firmly founded as one of the key support activities for adults who wish to continue with their education. Apart from career guidance, they also exposed the need for informing and deeper guidance and counselling for adults who need help in the personal and educational field as well as in the field of their careers. By placing the emphasis on the groups of adults who have a marginal position in the educational process the centres provide personal, educational and career guidance prior, during and after the education process.

A great interest in career guidance³ is also expressed by the Organisation for Economic Cooperation and Development (OECD), that has published the report 'Career Guidance and Public Policy: Bridging the Gap' (2004). The publication confirms that the OECD is dedicated to strengthening the workforce and capital market; already from the definition of the term 'career guidance' it is clear that it mainly focuses on helping the youth and those adults who might, due to the needs in their work, pursue further education. The problem is the lack of unbiased, independent agencies/centres for guidance that would not operate under the patronage of any interest groups (employers, educational institutions).

The comparison of the development of guidance in Great Britain shows that even guidance related to education is predominantly influenced by the workforce market, which also governs the educational policy in these countries. It seems that the understanding of education as a community and general human commodity is currently unrealistic and neglected - which is also shown in the development of such infrastructural activities as guidance and counselling services.

Situation in Slovenia

In Slovenia the activities at the disposal of adults who want to continue with their learning or education process are relatively well developed. The field has developed similarly as in most European countries; the best developed is guidance for work and employment. Career guidance (or as they call it 'career orientation'⁴) takes place at the Employment Service centres and the Career Guidance Centres (CIPS). From the year 2000 onwards a network of centres for informative and guidance activities for all adults in the local environment started developing (the ISIO project)⁵. Apart from these two – systematically developed and dispersed and state (co)funded and controlled forms of help – adults can also

³ The term 'career guidance' defines the activities that ensure that people of all ages and in various life periods can decide as regards education, training and work as well as plan their careers. On the basis of these activities they find it easier to understand the connections between the workforce market and the educational systems and consider their possibilities. Contemporary career guidance tries to teach the individual how to plan and perform his decisions connected to his work or learning. (Career guidance and ..., 2004, pg. 19).

⁴ Currently this term (career orientation/karierna orientacija) is used by the Employment Service and CIPs as the key term for defining career guidance. As such it substitutes all previous expressions, for instance career guidance, professional guidance, professional orientation and others. This terminology is problematic because it creates the belief that an individual enrolls into education programmes solely for the purpose of extending his career. In the phase career orientation the word 'orientation' is also problematic, for it functions as a directive. When we are dealing with guidance and counselling in adult education, it is important to use non-directive guidance, for in this way the key principles are taken into account, i.e. the principles of voluntariness, autonomy, personal activity and other principles that ensure the activities of adults.

⁵ The project carrier is the Slovenian Institute for Adult Learning, the centres are financed by the Ministry of Education and Sport, partially they are financed from the funds obtained from the European Social Fund.

obtain information and advice as regards enrolment possibilities and continuing their education in educational institutions, which they attend or are planning to attend. Amongst them one can find various institutions for adult education and other institutions that occasionally or permanently – alongside their main activity – also perform adult education activities (for instance various private educational institutions, universities, secondary schools, associations, health organisations, culture organisations, institutions and homes, etc.). This guidance and counselling is mainly intended for adults who are entering programmes offered by these institutions and once they have enrolled into trying to keep them in these programmes. This group lacks most of those adults who would need education the most and for which we believe that they would consequentially need different types of help in their learning and education processes.

There is important difference between career guidance in CIPS and educational guidance and counselling for adults at the ISIO centres. The first is intended almost exclusively to training and education for work and employment, and includes the discovery of interests, overcoming obstacles and encouraging motivation in the search for employment as well as concrete skills necessary when entering the workforce market. Career guidance ('career orientation') performed in the Employment Services and CIPs is mainly intended for the youth and the unemployed adults. The model is a combination of guidance and planning the job path and career of the unemployed, as well as employed individuals. In Slovenia such guidance can be performed also by the Chamber of Commerce and Industry, The National Centre for Vocational Educational Training and private enterprises (Šlibar 2006). The national CIPS (NCIPS), the tasks of which are expert development and merging the activities of CIPS throughout Slovenia, is a member of the European EUROGUIDANCE network, which operates under one of the European commissions. Currently a network of 25 CIPs is established in Slovenia. In seven towns CIPS has got only information spots in operation (more data can be accessed on <http://www.ess.gov.si/slo/Ncips/ncips.htm>). The centres for informing and career guidance therefore operate in all area centres of the Employment Service of the Republic of Slovenia.

The second form of help offered to adults in their learning and education process takes place at Public Universities⁶, has much broader goals and is closer to what we (in this paper) define as 'independent' guidance and counselling in adult education. Because we are mainly interested in this part we will take this opportunity to explain a few details.

⁶ These are Public institutions for education and training, meant for all adults, offering formal and nonformal education and training.

The Guidance and Counselling Centres for Adult Education (ISIO) are intended and equally accessible to all adults in the local environment in which the centre operates, and especially to those groups of adults who rarely participate in the education process – the lower educated individuals, those who have harder access and are in a tougher situation (Dobrovoljc, Vilič Klenovšek 2006). Between the years 2001 and 2005 a network of 14 guidance centres emerged (one in each educational district) within the Public Universities; those were rationally selected to carry this task, for according to the set measures they ensure sufficient quality of work within their institutions. However we still think that they might – regardless of their endeavours to work as objectively as possible – favour the education possibilities within the institution in which the ISIO centre operates. In order to avoid this danger it would be ideal if such ‘independent’ centres would not operate within the frame of educational institutions.

ISIOs are trying to ensure free, quality, expert and wholesome adult guidance and informing. At this they are trying to connect as many providers of educational and guidance services for adults on the local level as possible (Dobrovoljc, Vilič Klenovšek 2006). The last data on the operation of these centres (2007/08) shows that almost 18.000 individual services took place within this year, out of which almost one half were of a counselling nature (43%) and a slightly smaller share was of an informative nature (36%). Most informing and counselling (66%) took place prior to the inclusion into the education process, while a quarter took place during the education. The services mainly dealt with informing and counselling for raising the level of education and training for work, spare time and personal development. In relation to this especially dominating were the issues on financing and educational possibilities (Data on the Operation of the Network ..., 2008). In this year the centres were visited mainly by younger advice seekers (46% were under 30 years old, the remaining were older), who were in most cases employed (47%) and had finished secondary school or less. From the data we can see that the target group of adults who visit guidance centres for adult education, is very diverse, however younger adults with lower education dominate.

The analysis of the structure of people who attend the centres and their activities shows that greater attention will need to be paid to obtaining the less active target groups of adults (e.g. older adults, who currently represent a minority, immigrants, ethnic minorities, lesser educated inhabitants from rural areas, certain groups of the employed, etc.). Even though the emergence and development of the guidance centres for adult education provides an exceptionally beneficial possibility that offers a counterweight to career guidance (‘career orientation’) - which takes place in the Employment Services - the state should play a greater

role in its development. This is also a consequence of the fact that the guidance centres are located within the Public Universities, which today represent the local centres for adult education, however they are mainly frequented by active adults. The project is based on partnership cooperation and a local network that links various key institutions that are important for the adult education process. As such it enables adults to access information and guidance also from other locations⁷. It is extremely important that the informational activity develops also elsewhere in the local community, for instance in places where education does not take place. This is a part of the plan with which ISIO wishes to increase accessibility of the vulnerable groups of adults so that they would be subject to guidance and counselling and consequentially also to education. To a certain degree this is already being carried out with the aid of dislocated units that occasionally offer the possibility of informing and guidance (for instance libraries). However, the problem of financing a sufficient number of expert workers remains if the guidance and counselling centres are to run smoothly.

Conclusion

The overview of the development and offer of guidance and counselling in adult education in some European countries (including Slovenia) shows that the main state support is given to the field of information and guidance related to work and profession. The various development services in Slovenia that deal with this field⁸ agree that in the future of this field further connections will be necessary if various types of help are to be offered to adults during their education and learning process. Adults form a non-homogenous group that differs in age, social roles, educational, vocational and social status (to name just a few), so their needs for learning and education are extremely diverse. In accordance to that it is necessary to offer various possibilities of help that adults could obtain from various locations. The model offered by V. Riviš (1992) can be a starting point of the further development of guidance and counselling activities in Slovenia; it is based on three appearance forms of developing guidance and counselling activities, which each in their own way fulfil the various needs of adults for guidance: employment-oriented guidance, education-oriented guidance and 'independent' guidance.

⁷ According to the available data guidance centres had over 100 strategic and over 170 expert partners in 2008 (Data on the Operation of the Network ..., 2008)

⁸ Mainly the Employment Service of the Republic of Slovenia and NCIPS within its frame and the Slovenian Institute for Adult Education.

At the *employment-oriented guidance*, the economic goals are in the foreground; this guidance can be fees/voucher founded. It is performed by services for career development, private and other institutions. The economically active individuals are better supported than groups; there is less connections with other providers of guidance activities.

Looking at the development of the career guidance field in Slovenia (which has more state support than the development of ISIO adult educational guidance centres) we can ascertain that this is a priority field in Slovene politics. It is the same across Europe, where it mainly focuses on the youth and partially on the unemployed adults.

Education-oriented guidance is run by educational institutions for their own needs and is performed by the employees of these institutions. Priority is given to participants and future participants of the educational programmes; their achievements are important. The development of a network is less important, and less help is offered to groups. The achievements of the guidance work are evaluated and are subject to marketing, which leads to impartiality. In Slovenia such guidance work is performed by various educational institutions for their own needs. The 1998 research conducted by the Slovenian Institute for Adult Education (Vilič Klenovšek 1999) has shown that such informing and guidance is performed - for instance - by secondary schools who have a unit for adult education as well as private educational institutions.

Parallel to this the so-called *independent guidance* is supposed to have developed. This is a part of the activities within the voluntary sector and the local community. Such guidance should be financed by the local budget (municipality), as well as from the funds for training in companies or funds from other local organisations. This guidance activity fulfils various demands of the learners, supports various networks and cooperates with them. It is intended for the learning adults of all ages, especially the ones who are educationally marginalised; it actively develops all types of guidance and counselling in adult education. Independent guidance work is often on the margins of the official systems of education and training; it is endangered by political changes and the lack of financial means as well as the inconsistent financing.

For an efficient development of independent guidance and counselling in adult education we will need to increase the cohesion of the community and support the development of various communal activities. In order to increase the social inclusion of the marginal groups it is necessary to develop educational guidance and counselling that would be as close as possible to the location in which these adults live and work. The above described model was developed by V. Riviš already a while ago, however within the overview of the current possibilities

in various European countries we could ascertain that independent guidance for learning is still underdeveloped and neglected and that this is the part of the guidance activities for adults that would deserve special attention from the experts and the general public. In this way we would also come slightly closer to the promises and predictions that can be seen in various national and European political documents and strategies.

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Vođenje i savetovanje u obrazovanju odraslih: primer Slovenije, Engleske i Irske

Apstrakt: U većini evropskih zemalja karijerno vođenje (posebno za mlade) je u prvom planu; vođenje u obrazovanju i savetovanje kako pomoći odraslima i njihovim obrazovnim procesima često se ne vidi kao „standardna” aktivnost i da kao takvu treba da je plate sami odrasli ili njihovi poslodavci koji imaju korist od njihovog obrazovanja. Utvrdili smo da ponuđene mogućnosti za dobijanje informacija ili vođenje ne osiguravaju jednak pristup različitim ciljnim grupama. Pregled aktivnosti u oblasti savetovanja i vođenja u obrazovanju odraslih pokazuje da je ova aktivnost pretežno orijentisana na informisanje i karijerno vođenje i da funkcioniše u skladu sa zahtevima tržišta rada. Iako su savetovanje i vođenje u obrazovanju odraslih relativno dobro razvijeni u Sloveniji, ovo je i dalje marginalna oblast obrazovanja (odraslih) u okviru obrazovne politike jer nije sistemski ni finansijski regulisana. Brojne evropske zemlje (uključujući i Sloveniju) primetile su neslaganje između političkih polazišta koja su navedena u različitim dokumentima i stvarnog stanja.

Ključne reči: karijerno vođenje, obrazovno vođenje i savetovanje, odrasli.

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Education Behind Bars: The Case of Sweden

Abstract: Adult Education has a long tradition in Sweden. Historically its primary task has been to provide elementary or secondary education to those who lack such qualifications. The Adult Learning is now aimed to meet the needs of people who as a result of changes in working life or for their own personal development seek further knowledge and skills. At European Union level and in the individual European countries, efforts are being made to ensure that young people and adults obtain the knowledge and skills they need to face new employment situations in a society in a state of constant change. It is clear that without these skills and this knowledge, individuals will be excluded from the ordinary educational system and the labor market. The prison population is a vulnerable group in this respect. In the Swedish prison system, it is the actual deprivation of liberty and not the prison operations that make up the punishment. Instead, the time in prison should be used to reduce the risk of reoffending by creating opportunities for the prisoner to abstain from a criminal life once out of prison. The role of prison is to prepare the prisoners for their return into the society and to counteract any adverse effects of the imprisonment. The imprisonment should from the outset prepare the prisoners for their release. The purpose of this paper has been to provide a brief description of education and training in Swedish prisons. The statistics are primarily from 2007 and 2008.

Key words: prison education, lifelong learning, adult education, client's education, correctional education.

Introduction

Adult Education in Sweden has a long tradition. It is provided in many different forms and under many different auspices, ranging from municipal adult

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education to labour market training programmes. One fundamental principle of the Swedish education system is that everybody must have access to equivalent education, regardless of sex, ethnic and social background and of place of residence. (Regeringskansliet, 2006/2007)

Prisoners have rights concerning education and training, and these rights are regulated in international conventions and recommendations. In prison by participating in work, education, criminality and abuse related programs, etc. on working hours, as well as in structured recreational activities, prisoners can satisfy their individual needs and prepare for their release. (Nordic Council of Ministers, 2009: 508). There are many important reasons for which prisoners should improve their education. From a socioeconomic point of view, educational shortcomings, resulting in poor opportunities on the labor market, make individuals who have served time in prison dependent on welfare benefits, thus increasing the burden on society.

Educational activities are among the instruments at the disposal of society to increase the chances that prisoners, who have served time under the auspices of the Prison and Probation Service, will be able to create a life for themselves in society free from crime and drugs.

The member states of the United Nations and the Council of Europe undertake to implement the conventions and recommendations to which they are parties, and the Nordic countries have thus incorporated the European Convention on Human Rights into their legislation. (Nordic Council of Ministers, 2009: 536)

If prisoners are to receive education and training on the same terms as the rest of society, then it is a basic prerequisite that their rights are clearly stipulated in the legislation. While the authorities in all of the Nordic countries actively advocate lifelong learning and skills enhancement for adults, there are studies who reveals that prisoners' rights to education and training are less clearly defined. Legislation governing prison and probation services must also stipulate, therefore, that the only thing of which a prisoner is to be deprived is his or her liberty. In principle, all other rights must be upheld. (Nordic Council of Ministers, 2009: 536)

Considering the importance attached to lifelong learning and the attention paid to the need for continuous skills enhancement and to the increasingly multicultural nature of Nordic society, all these elements need to be acknowledged in prison education and training.

Prison education and training must reflect the ordinary educational system. Research shows that many prisoners have had inadequate schooling compared with the rest of the population. In terms, for example, of the right to edu-

cation and training, the humanitarian perspective, and rehabilitation, education and training is considered an investment in crime prevention in the sense that it will increase the number of prisoners who continue their education and find jobs after release. (Nordic Council of Ministers, 2009: 536)

A prison sentence is one of the ways in which society can react to undesirable actions. This reaction builds on the instruments available to the Prison and Probation Service to promote the reintegration of the prisoner into society. The educational authority is one of the national agencies meant to ensure that convicted prisoners receive the education to which they have a legal right. The prison and probation services have responsibility for coordinating the measures implemented by the various state authorities so that prisoners have well-organized, positive options. (Nordic Council of Ministers, 2009: 536)

There are 61 prisons from south to north in Sweden. Inmates are transferred between different prisons, so it is important to have a national education organization. The prisoners have to be able to continue their studies wherever they are. This has been achieved by establishing a Learning Centre at each prison in the country.

History

Prison education has taken different forms in the Swedish prison system over time. In the nineteenth century the clergy were very important, particularly in teaching reading skills. Ambitions in terms of thinking that prisoners should also learn a trade or vocational skills have also been documented.

In the early twentieth century prisoners were only allowed to write one letter per month, although there were also various privileged exceptions. The right of the prisoner to read was also generally extremely restricted. All a prisoner was actually permitted to study were the "cell books", i.e. the New Testament, the hymnal and a devotional volume with the English equivalent title: *In Solitary Hours*. (Arnelund, 1994)

The general prison system was based on incarceration in individual cells. Prisoners were not meant to be in contact with each other, because they might influence one another negatively. Once the Comprehensive School Statue was put into effect in 1842, all prisoners under the age of 35 had to participate in educational activities. This made the correctional system quite pioneering in the area of adult education in Sweden. In accordance with the principle of single cell prisons, the classrooms were constructed so that prisoners sat and studied in little cubicles and were able to see the teacher but not their fellow prisoners. With the introduction of the 1916 Enforcement of Sentences Act and the reform of

sentence enforcement regulations in the 1940s, prisoners began to be allowed to spend time in each other's company and to have more contact with the outside world. (Kriminalvårdens Historiska Utställning, 2010).

Folk high schools were the main arrangers of prison education from the 1950s through the mid- 1970s. These institutes of adult education were considered the natural organization to take on the task of providing prisoners with further adult education. In practice, a folk high school in geographical proximity to the prison would set up a branch in the prison, using the school's teaching staff to run courses corresponding to those offered by the folk high school in Swedish, mathematics, civics, English, and Swedish for immigrants. (Henning Loeb, 2006)

In the mid – 1970s the Prison and Probation Service shifted responsibility for prison education to the community adult authorities at municipal level. This was also in accord with the new legislation that came into force after the 1974 reform of the correctional system, based on the principles of normalization and proximity. Therefore, the Prison and Probation Service began to cooperate with the National Agency for Education and the National Labor Market Board. General education in prison was to be organized under the auspices of the municipal adult education authorities and the national adult education establishments, and vocational education in prison was to be provided on equal terms as in the community, i.e. in the form of labor market training courses. (Henning Loeb, 2006)

Swedish legislation on the right to basic education for adults (corresponding to the first seven years of comprehensive school) did not distinguish between prisoners and other citizens.

Extensive decentralization in Sweden during the 1980s resulted in the abolition of funding at central level from the National Labor Market Board for special vocational courses in prisons. This responsibility now rested directly with the county labor market boards which, in turn, delegated it to the local employment services, so that the employment services nearest each prison took responsibility for that prison. (Henning Loeb, 2006)

Prison education until the early 1990s was an integral part of Swedish adult education policy, with its emphasis on special efforts for people who have had least access to society's resources and adults with inadequate educational backgrounds. Until then, prisoners had the same rights to basic education as all other citizens. After funding was transferred from the Ministry of Education to the Ministry of Justice, this legal right no longer applied. The Adult Education Act stipulates that every inhabitant of a municipality who does not have the skills to be achieved in comprehensive school has the right to participate in basic adult education from the age of 20. However, it also states that "The stipulations in this

article do not apply to prisoners". Thus, since 1992, prison education has been regulated by the Act on Correctional Treatment in Institutions. (Nordic Council of Ministers, 2009: 536)

A significant change in prison education took place in 2007, when the Ministry of Education issued a regulation "on education in correctional care in prisons" (SFS, 2007: 152). Pursuant to this regulation, it became possible for the Prison and Probation Service to offer educational activities corresponding to municipal adult education (SKOLFS, 1994: 2) as well as Swedish language courses for immigrants (SFS, 1994: 895). According to this legal clarification, such educational activities are to be directed by the headmaster, and must follow the relevant curricula for municipal adult education. The Prison and Probation Service is now authorized to issue grades, and is under the supervision of the National Agency for Education. The grades are not to reveal that the studies were pursued at a prison facility. (Henning Loeb, 2006)

Under the new system, prisoners, wherever in Sweden they are placed, are offered educational activities that are equivalent both from prison to prison and with municipal adult education as offered in the community. It should not be formally difficult for prisoners to continue studies begun at one facility after transfer to another facility or release. Studies are graded in the same way as at schools in the community. This means that prison education is now an integrated aspect of regular adult education. (Nordic Council of Ministers, 2009:508)

On the basis of the regulation issued by the Ministry of Education, the Prison and Probation Service has issued special guidelines for prison education. The guidelines describe the objectives and limitation of these educational activities and how they are to be run. (Prison and Probation Service, 2010)

There are more than twenty different education organizations working within the prison service system. Among these, we have adult education administered by local authorities, a couple of large educational companies, some adult education associations, some high-schools, some private educational companies and some "prison service teachers". (Lindström & Leijonram, 2008)

Description of prison education

The Ministry of Justice is responsible for establishing prison policy, but has no authority to interfere in the daily work of the prisons and probation service centrally or regionally. This is, instead, the responsibility of the Swedish Prison and Probation Service under the supervision of the Swedish National Agency for Education. (Lindström & Leijonram, 2008). The main tasks of the Prison and

Probation Service are to implement prison and probation sentences, to supervise conditionally released persons, to implement instructions for community service, and to carry out pre-sentence investigations in criminal cases. The Prison and Probation Service is also responsible for activities at remand prisons and the transport service. (Prison and Probation Service, 2010)

Education is one piece of a larger puzzle where the various pieces are to be described in a sentence plan for each prisoner, adapted to his or her needs and providing a platform on the basis of which the individual will be better equipped to return to life in the community – “better out”.

Formal adult education under the auspices of the Prison and Probation Service is subject to the statute on prison education (Utbildningsdepartementet, 2007), and the Swedish National Agency for Education is the supervisory body. When applicable, prison educational activities follow the national instruments regulating the corresponding educational activities in the community. (Nordic Council of Ministers, 2009: 536)

Practically, all institutions have study facilities. The inmate can study subjects from compulsory basic school level and upper secondary school level. The inmate can also study at university through distance learning. Many inmates work and study at the same time. (Lindström & Leijonram, 2008)

Prison education is available, usually on a part-time basis, either theoretical or practical. The levels of prison education in Sweden are:

- Basic adult education (grades 1-9, primary and lower secondary levels, including Swedish for immigrants)
- Upper secondary education,
- Vocational education,
- University and other higher education,
- Other education (study circles, parenting courses, etc)

All these levels are offered as part of the structured activity programs in Swedish prisons. Thus “program” is an umbrella term covering various goal-oriented activities including: education (general and practical), work, criminality and abuse-related programs, library activities, creative activities, physical activities, and sports and social skills training. (Prison and Probation Service, 2010)

There is an agreement between the Prison and Probation Service and the Public Employment Service governing both the focus and scope of vocational training, including labor market skills training. University and higher education is offered as remote learning by all Swedish institutions of higher education, with individual tutoring given to the prisoners by the regular prison teachers, and

other forms of education such as study circles and informal education, such as courses on parenting. (Prison and Probation Service, 2010)

Because prison education is one aspect of the national educational policy ambitions concerning adult education, priority is given first and foremost to individuals who have not completed compulsory school or the equivalent form of adult education. Next, priority is determined on the basis of the same principles as for municipal adult education, meaning that individuals who:

- Wish to complete studies begun in accordance with an individual study plan,
- Need further education for a job they already have,
- Need education for planned or future professional choices

All participation in both general and practical education takes place on the basis of a sentence enforcement (treatment) plan, individual for each prisoner. Activities that are part of the agreed plan are to be arranged for thirty to forty hours per week. They are obligatory, and remuneration is paid for them. As this implies, prisoners must participate in organized activities. However, participation in educational activities is voluntary. To participate, prisoners must apply, and must be motivated. Work and educational activities are remunerated in accordance with a fixed hourly salary, although a piece-work/performance rate may be paid in addition for some types of work. (Prison and Probation Service, 2010)

Education for prisoners

Education is one aspect of what the Swedish Prison and Probation Service define as “program activities”. All prisoners are required to participate in activities, defined as work, schooling, “criminality and abuse related treatment programs” and other structured activities. The regional office and local prisons meet twice a year to discuss the organization and scope of required activities/activities offered by each prison. The decision of who participates in education is made in accordance with a structure through which each prisoner’s study objectives are clarified and the remote learning options determined when necessary. When this has been done, a meeting is held, at which the individual’s studies are examined in a larger context. (Prison and Probation Service, 2010)

In prison by participating in work, education, criminality and abuse related programs, etc. on working hours, as well as in structured recreational activities, prisoners can satisfy their individual needs and prepare for their release.

Since 2007, general education in prisons is taught by teachers employed by the Prison and Probation Service. The teachers are directly responsible to the regional prison education headmasters. Every region headmaster has the overall responsibility for all prison educational activities. These activities take place at "Learning Centers" modeled on those used in municipal adult education. This facilitates the transition to society for prisoners wishing to continue to study after release, who will feel familiar with both the environment and the organization of studies. The teachers at the prisons have experience of education and are qualified to teach at upper secondary level as well as at more basic levels. (Nordic Council of Ministers, 2009: 536)

The key tool to prison educational activities today is a computerized platform, "Nätcentrum", (Netcenter), enabling every student, on the basis of his or her own individual study plan, to study the subjects he or she needs, in order to achieve the established goals. Remote studies give students access to subjects and teaching competence beyond what is available in the prison where they are serving time. The relevant teachers have responsibility for their own subjects and for giving grades, via the Net Center, telephone and postal contact. At their prison schools, students also have access to general educational support thanks to the teacher(s) working there. Students carry out their remote studies from the same facilities/at the same Learning Center where other studies are pursued. Remote study is a valuable option in that it increases access to education and contributes substantially to increased possibilities for individualization. Because it is not tied to any specific time or place, it is also a type of education that is less vulnerable in relation to transfers. (Kriminalvården, 2007)

Vocational training is usually carried out in conjunction with the local employment service, which also organizes and funds it. It takes the form of labor market courses, with the same quality demands as for courses in the community. The cooperation between the Prison and Probation Service and the employment services follows a central agreement with the Swedish National Public Employment Service stating that prisoners have the right to services on the same conditions as other users of the employment services. (Nordic Council of Ministers, 2009: 508)

Many prisoners have the problem of having had very little experience of the labor market. This absence of work experience contributes to their difficulties in getting and keeping a job, as does their often incomplete schooling. Even in times of economic boom, prisoners and former prisoners often need extra support in finding work. Advisory services, job application courses, preparatory and vocational education are examples of what the employment service can offer. (Nordic Council of Ministers, 2009: 536)

Educational activities are among the instruments at the disposal of society to increase the chances that prisoners, who have served time under the auspices of the Prison and Probation Service, will be able to create a life for themselves in society free from crime and drugs. The various objectives for prison education range from development of prisoner's competence, to helping them be better able to go on studying after release or getting a job, as well as developing informal competence, helping them take responsibility, take part in teamwork, and function in groups. To put it simply, formal competence can (in the long run) lead to a job, and informal competence can contribute to being able to keep that job and otherwise improve one's quality of life. (Nordic Council of Ministers, 2009: 536)

Studies in the community with day release privileges

One way of improving prisoners' chances of studying on equal terms is the use of day release privileges so that prisoners can leave the institution and participate in studies at a municipal Learning Center outside the Prison and Probation Service. Opportunities for studying with day release privileges are regulated in the instructions and general guidelines from the Prison and Probation Service concerning special measures for transition to the community, including day release, halfway houses, and "close supervision release". (Nordic Council of Ministers, 2009: 536)

Prisoners on close supervision release live at home but with electronic shackle supervision, and participate in studies or work. The aim of close supervision release is to make it easier for the prisoner to have a job, and thus to develop a stable lifestyle after release. Prisoners with highest priority for close supervision release are those who do not have a place on the labor market and therefore require an introduction to working life. (Nordic Council of Ministers, 2009: 536)

Internet based education – new opportunities

Another way of integrating prisoners into the ordinary educational system is through access to modern technology, such as Internet-based education. More and more adult education in Sweden is offered as remote learning via the Internet. This makes it possible to tailor both the educational activities and study schedules to the needs of the individual. It is also well suited to the needs of prisoners, making them less dependent on being physically present in the right place at the right time. The use of Learning Centers in Sweden utilizes technology that makes it possible to provide prison education as remote learning. One of the

results is that the number of grades issued in a large number of subjects has risen. (Nordic Council of Ministers, 2009: 536)

All the teachers and local Learning Centers are under the umbrella of the National Learning Center, thus enabling all prisoners to study, wherever they are. Both the use of flexible learning and teachers in different prisons teaching different subjects provide support to the students in their learning processes. There are no classes, no lessons and no terms. The education is all individualized. If there is one single student somewhere in the country, wanting to study French or something, it is okay. He or she does not have to wait until there is a group of five students, for example. The students study at their own place; they can start at any time of the year and they all have their own individual study plan. When a student has started a course and then is transferred to another prison, he continues with the same teacher until the course is finished and the grade is taken. The teaching is totally individualized concerning, for example, courses, study place, and starting date, thanks to the Net Center. It is mainly used for communication between teachers and students when they are not in the same place. A separate virtual room is created for each student where he or she is connected to a remote teacher. Only one student and one teacher have access to each room, a forum for their communication. It is possible to attach a file, such as a Word document, to a message, as well as a video clip or a sound file. (Nordic Council of Ministers, 2009: 536)

The Net Center is an Intranet for prisoners and teachers. Although prison teachers have full access to the Internet, students can only use the Internet with permission and under supervision. They are, however, free to use all the Intranet services.

Statistics

In 2006, work programs comprised about 31 % of all program activities, education formed 16 %, service and maintenance programs comprised 25 %, specialized rehabilitation and treatment programs, 5 %, and other activities 21 %.

This section describes the group of prisoners in Swedish prisons who participate in prison educational activities while serving their sentences. The majority of the prisoners' (57%) were not participating in some prison educational activities, while 36% stated that they were participating in some prison educational activity. Seven per cent chose not to answer the question about participation. All data represented in this section is official statistics from the Swedish Prison and Probation Service.

Educational level of prisoners

The general educational level of prisoners is low, eleven per cent had no completed level of education at all in 2007 (Eriksson – Gustavsson and Samuelsson, 2007). Just fewer than 40% had completed no more education than compulsory level, while 34 % had completed a two to four year upper secondary school program. A total of 36 % stated that they were participating in some educational activity while serving their sentences.

Prison educational activities

The majority of educational activities, 40%, are at upper secondary level, followed by basic general education corresponding to nine-year compulsory school, 34%, and vocational training, 22%. Approximately 4% of the studies pursued are at university or higher education level. The nature of prison educational activities has changed markedly since the model using Learning Centers and remote studies was introduced in 2006–2007. Previously, prisoners could only choose courses the local teachers were qualified to teach, while now they can, in principle, be in contact with the teachers who have the qualifications that best suit their own needs, irrespective of where both student and teacher are located. For an individual student, this means an increase in the course options from, perhaps, five or six local courses to more than one hundred subjects.

Differences between women and men

It was found when comparing male and female prisoners that slightly more than half the female prisoners were participating in prison educational activities, while the corresponding figure for the male prisoners was approximately 30 %. For both male and female prisoners who decided to participate in prison educational activities, upper secondary studies were the most common type of study.

Age differences

In all age groups, the proportion of prisoners who did not participate in any educational activity was greater than the proportion of prisoners attending educational activities in the prison. The largest proportions of prisoners attending educational activities in the prisons were in the age groups 25 – 34 and 35 – 44 to compare with the lower proportions obtained for the age groups 18 – 24 and 45 +. For all age groups except 45 +, upper secondary studies dominated. For the oldest age group, the most common activity was “other educational activities”, followed by upper secondary studies.

Study motivation

The motivation for prisoners to participate in educational activities mainly concerned the future after release: questions in the study posed to determine what motivated prisoners to participate in educational activities focused on the future after release, personal satisfaction in terms of learning and new knowledge, studies as a way of alleviating boredom, and studies that satisfy the social and emotional needs of the prisoners (Eriksson-Gustavsson and Samuelson, 2007). According to the prisoners, it was important to use their time in prison well in order to learn more, improve previous grades, get jobs, and cope better after release. They also felt that studies in prison might help them feel able to go on to more education after release, and satisfied their need and desire to learn. Incarceration is a time of constant waiting for release, and the prisoners also stated that educational activities were a way of “passing the time”. Neither having friends who were studying nor encouragement from prison staff seem to have been important factors in deciding to study.

Reasons for not participating in prison educational activities

The main reasons given for not participating in prison educational activities were that the prison did not offer any such activities, or that there were no activities on offer suited to the needs of the prisoner, for instance vocational training. More than one quarter of the reasons indicated by prisoners who not participate in any educational activity belongs to the categories “not interested”, “not worth the efforts” and that he or she already has enough education.

Conclusions

In the European Union as a whole and in individual European countries, authorities focus on providing young people and adults with the qualifications and skills enhancement they require to be able to perform the new tasks in a society in constant change. Individuals unable to utilize these opportunities for skills enhancement will find them marginalized from general educational and the labor market. In this context, prison populations are vulnerable groups.

It is important to organize the education for each prisoner on the basis of what he or she knows and has mastered. This is the starting point from which it is possible to give each prisoner a long-term chance of having his or her educational needs satisfied. Education is offered for the benefit of the prisoner, for his or her own personal development, as well being one aspect of the general effort of creat-

ing a better platform to stand on after release from prison – hopefully to a life free from criminality and drugs.

Today, the prison population is approx. 500 inmates less than in 1992. This change is mainly a result of the use of intensive supervision with electronic monitoring and community service. Those alternatives are possible for persons who are sentenced to just a few months, when we had this category in prison some years ago they were almost never eligible for any education because of the short time.

Today, every prison has a highly diverse population, which must be taken into account when educational activities are being organized. Every year more and more young people with a former upper secondary education come into the prison system. They may have forgotten a lot, some things they may have never learnt, but with longer and longer sentences they have plenty of time to do something about it. They may need to refresh their memory and do some parts again, but they definitely do not belong in the basic education classrooms. If you are working with classroom teaching in the traditional way, you often start a course at the beginning of the term and finish it at the end. However, the high turnover of prisoners in most Swedish prisons affects the prison education. You may well have ten pupils in a group with the intention to learn, for example Spanish, but at the end of the term you will probably not have more than three or four pupils left – the rest having been transferred to other units or prisons, released or found something else to do.

It is a matter of concern that so many young prisoners have a need for compulsory and upper secondary level education. The prison and probation services and the educational authorities must make regular surveys of prison populations, identify needs, and see to it that the educational activities offered are kept in line with these needs. Many young prisoners serve short sentences and can easily become a stepping stone to further criminality, which makes it particularly important to see to it that this kind of short sentence does not imply a disruption of young prisoners' education. One possible approach would be to evaluate the skills of every prisoner serving a short sentence and then draw up a plan that would also motivate him or her to continue in education after release.

The prison education offered today does not satisfactorily correspond to prisoners' educational needs. Good cooperation between the prison and probation services and other authorities is one of the key starting points for satisfying prisoners' educational needs.

Increased investments in prison education would probably be of added value for society as a whole. From a socioeconomic point of view it would undoubtedly be beneficial to invest more in prison education. However, education

in prison in order to be effective must first of all meet the needs of prisoners and, secondly, ensure continuity of the learning process and the possibility of participation of all prisoners. The big challenge of course is to overcome all difficulties which entails in the place of detention.

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Obrazovanje iza rešetaka: švedski primer

Apstrakt: Obrazovanje odraslih ima dugu tradiciju u Švedskoj. Kroz istoriju, primarni zadatak obrazovanja odraslih bio je da omogući osnovno i srednjoškolsko obrazovanje onima koji tu kvalifikaciju nemaju. Danas, obrazovanje odraslih ima za cilj da odgovori na potrebe ljudi koji, kao posledicu promena u radnom odnosu ili njihovog ličnog razvoja, teže daljem sticanju znanja i veština. Na nivou Evropske unije i pojedinačnih zemalja u Evropi, uloženi su naporu kako bi se omogućilo mladim ljudima i odraslima da stiču znanja i veštine koje su im potrebne kako bi se suočili sa novom situacijom u oblasti zapošljavanja u društvu koje se stalno menja. Jasno je da će bez ovih veština i znanja pojedinci biti isključeni iz redovnog sistema obrazovanja i tržišta rada. U ovom smislu, zatvorenici su posebno ranjiva grupa. U švedskom kazneno-popravnom sistemu, uskraćivanje slobode je kazna, a ne rad u zatvoru. Umesto toga, vreme provedeno u zatvoru treba iskoristiti da se smanji rizik od povratka u zatvor putem stvaranja prilika za zatvorenike kako se ne bi vratili kriminalu po izlasku iz zatvora. Uloga zatvora je da pripremi zatvorenike na povratak u društvo i da poništi negativne efekte boravka u zatvoru. Zatvor treba da zatvorenika pripremi za njegovo otpuštanje. Svrha ovog rada je da obezbedi kratak opis obrazovanja i obuke u švedskim zatvorima. Statistički podaci su za 2007. i 2008. godinu.

Ključne reči: obrazovanje u zatvoru, doživotno učenje, obrazovanje odraslih, obuka klijenata, obrazovanje u popravnim domovima

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Elementi marketing miksa kao činioci izbora visokoobrazovne institucije³

Apstrakt: Korišćenje društvene marketing orijentacije i „modela partnerstva“ u visokom obrazovanju predstavlja preduslov opstanka fakulteta u postmodernističkom društvu, ali i šansu za povećanje kvaliteta njihovog funkcionisanja. U ovom radu analizirali smo ulogu i značaj marketing miksa, kao ključnog instrumenta u ostvarivanju željene razmene između visokoobrazovne institucije i korisnika njenih usluga – studenata. Predstavljeni su i rezultati empirijskog istraživanja na osnovu koga smo utvrdili kako korisnici usluga visokoobrazovne institucije posmatraju značaj pojedinih elemenata marketing miksa u donošenju odluke o upisu fakulteta.

Ključne reči: marketing miks, visokoobrazovna institucija, obrazovna usluga.

Tokom svog razvoja, institucije visokog obrazovanja predstavljale su generator razvoja društva, izvor novih ideja i katalizator društvenih promena. Međutim, neravnomeran razvoj društva, eksplozija znanja, globalizacija, disproporcija moći (političke, vojne, ekonomske) na svetskom nivou, kao i brojni drugi faktori doveli su visoko obrazovanje u stanje *krize* koja dovodi u pitanje funkciju i ulogu univerziteta u savremenom društvu (više o ovome u Miljković, 2010). Ovi globalni obrazovni trendovi na domaćoj obrazovnoj sceni dodatno se usložnjavaju njenim autohtonim osobenostima. Najvažniji od njih su: pluralizam u obrazovanju koji se kao karakteristika javlja u protekle dve decenije i na koji se tradicionalni fakulteti prilagođavaju „u hodu“; ubrzano usložnjavanje „visokoobrazovnog tržišta“ osnivanjem brojnih privatnih fakulteta vrlo diverzifikovane orijentacije; prelazak na bolonjski sistem studiranja na koji se tradicionalni fakulteti prilagođavaju.

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godavaju takođe „u hodu“ i sa više ili manje uspeha; prisutnost stranih visokoobrazovnih institucija na domaćoj obrazovnoj sceni; uvođenje sistema akreditacije fakulteta na nacionalnom nivou, kao mera garancije kvaliteta obrazovanja.

Sve nabrojane karakteristike uticale su na to da se pred visokoobrazovne institucije postavlja zahtev za povećanjem stepena marketing orijentacije u njihovom poslovanju. Marketinški pristup u visokom obrazovanju doprinosi ne samo ostvarivanju ciljeva visokoobrazovne institucije i ciljeva njenih korisnika – studenata, već i širih društvenih ciljeva. Ovakva orijentacija podrazumeva težnju ka kvalitetu u svakom segmentu poslovanja fakulteta, jer je tržište obrazovnih usluga diverzifikovano i nudi široku lepezu obrazovnih institucija, programa i obrazovnih oblika, među kojima budući korisnik obrazovne usluge – student, bira one koji mu prema svojim karakteristikama najviše odgovaraju. Upravo su *karakteristike obrazovne ponude* koje budući student uzima u razmatranje prilikom odluke o upisu fakulteta, operacionalizovane kroz konstrukt *marketing miksa*, predmet našeg interesovanja u ovom radu. Ovo smatramo relevantnim andragoškim problemom, s obzirom na činjenicu da će od sposobnosti fakulteta da odgovore na *potrebe* svojih studenata zavisiti njihov dalji opstanak na obrazovnom tržištu.

Primena marketing koncepta u institucijama visokog obrazovanja

Primenom marketinga, shvaćenog kao *proces razmene* između zainteresovanih strana, institucije visokog obrazovanja mogu znatno poboljšati svoje poslovanje i na taj način u većoj meri ostvariti vlastite i opštedruštvene ciljeve. Primena marketing koncepta u području obrazovanja treba da doprinese dobiti šireg segmenta društva i tržišta rada, uz podizanje svesti o važnosti doživotnog obrazovanja. Kotler (Kotler, 2001) naglašava tri osnovna uslova za ostvarenje marketing koncepta:

1. *orijentacija prema potrošaču* – ovo znači da fakulteti, koliko god imali prilike i potrebe da se bave primenjenim projektnim aktivnostima, naučnim ili društveno-političkim radom, kao i neizbežnim „alternativnim“ prikupljanjem sredstava, ne smeju ni za trenutak da zaborave osnovni razlog svog postojanja – rad sa studentima i usmerenost na njihov razvoj i dobit;
2. *dugoročno ostvarivanje dohotka, a ne orijentacija isključivo na količinu prodatih proizvoda, te orijentacija prema cilju – finansijskom ili nefinansijskom* – ovo znači da je dugoročno, strateško promišljanje jedino koje je moguće, ukoliko želimo da visokoobrazovna institucija opsta-

ne. Oni koji su osnivali fakultete s namerom da u mutnom vremenu uzmu novac i nestanu sa obrazovne scene, vrlo brzo će i nestati sa nje. Ukoliko ne postoji kvalitet obrazovanja i ukoliko institucija visokog obrazovanja ne zadovoljava potrebe korisnika njenih usluga, stvorice se negativan imidž koji će zasigurno nadživeti samu visokoobrazovnu instituciju. Investiranje u sopstveno visoko obrazovanje je suviše značajna životna odluka da bi potencijalni studenti rizikovali sa sumnjivim, neakreditovanim institucijama. Imidž obrazovne institucije je vrednost koja se dugotrajno i planski gradi, a koja može biti izgubljena za vrlo kratko vreme (npr. nakon samo jedne afere primanja mita, prodaje diploma i sl.).

3. *integrirani marketing* obuhvata integraciju svih aktivnosti organizacije – ovo znači da svi podsistemi visokoobrazovne institucije deluju sinhronizovano i planski s ciljem ispunjenja njene misije. Aktivnosti eksternog i internog marketinga, kao i aktivnosti širenja obrazovne javnosti su komplementarne i nemaju mnogo smisla ukoliko se posmatraju izolovano, izvan svoje funkcije. Oni koji misle da će uspešno promovisati svoju instituciju isključivo kroz reklamne kampanje i materijal, zanemarišći kvalitet sopstvenih nastavnih kadrova, obrazovnih oblika i programa, suočiće se vrlo brzo sa nezadovoljnim korisnicima i gubitkom interesovanja potencijalnih kandidata za upis na njihov fakultet.

Ovu orijentaciju Kotler i Foks (Kotler & Fox, 1995: 11) nazivaju *društvena marketing orijentacija*, a pod njom podrazumevaju fokusiranje institucije na identifikovanje potreba, želja i interesa svojih korisnika, kao i na načine koji će unaprediti ili sačuvati korisnikovu i društvenu dobrobit i njihove dugoročne interese. Ovakva orijentacija je u skladu sa ciljevima većine obrazovnih institucija.

Demografske promene, smanjenje finansiranja fakulteta od strane države kao i rastuća konkurencija samo su neki od faktora koji su mnoge visokoobrazovne institucije doveli do upotrebe agresivnije marketing strategije koja podrazumeva izjednačavanje studenata sa „klasičnim“ potrošačima u profitnom sektoru. Ovakva „osvajачka“ marketing strategija može imati sledeće posledice:

- viđenje studenta kao kupca može oduzeti vrednost tradicionalnoj ulozi fakulteta;
- studenti mogu biti ohrabreni da radije prenesu odgovornost na ponuđača usluga nego da preuzmu vlastitu odgovornost;

- neki smatraju da ovaj način tretiranja studenata i korišćenje ocena predavanja kao primarnog kriterijuma u ocenjivanju fakulteta i osoblja dovodi do smanjivanja akademskih standarda;
- nastavno osoblje može se smatrati „protivnicima“ koji stoje na putu onome što studenti žele ili kao figura koja je antipatična. Kad se pojave nesuglasice između profesora i studenata, institucija vođena ovom vrstom orijentacije logički se obraća profesoru i često (ne)opravdano staje na stranu studenata vodeći se pomalo profitnom uzrečicom: „Kupac je uvek u pravu“;
- Percepcijom studenta kao kupca koji je platio svoje školovanje, nedobijanje, neosiguravanje dobrog posla može biti posmatrano kao krivica ponuđača usluge;
- Postoji opasnost da neka visokoobrazovna institucija u svojim programima reaguje na želje studenata i da ima atraktivne predmete i smerove, dok su potrebe privrede i društva sasvim drugačije (Clayson & Haley, 2005: 1).

Navedeni razlozi opravdavaju zahtev za postavljanjem granica u primeni marketing koncepta pred visokoobrazovnim institucijama. Preširoko shvaćena potrošačko-prodajna analogija, u kojoj centralno mesto imaju potrebe potrošača, dugoročno može biti štetna za visokoobrazovnu instituciju, jer „potreba“ za kvalitetnim obrazovanjem nije očigledna svim studentima (ili potencijalnim studentima). Kao adekvatniji model prilagođeniji prirodi i funkciji visokoobrazovnih institucija, mnogi autori (prema: Mihanović, 2007) predlažu „model partnerstva“, koji podrazumeva da se studenti ne posmatraju kao „klasični“ potrošači, a ni kao proizvod koji treba oblikovati i na koji treba delovati, već kao jedan od partnera u pružanju obrazovne usluge. Ovo i dalje znači da su studenti sa svojim potrebama i dalje u centru pažnje, ali ne i da su „studenti uvek u pravu“.

Treba naglasiti da marketing nije prosto reagovanje na okruženje, već je to *proaktivan proces* koji anticipira i modelira događaje. Fakulteti nisu nemoćni, zatečeni posmatrači na obrazovnoj sceni. Oni svojim aktivnostima, kvalitetom obrazovnih programa i kvalitetom realizacije nastavnog procesa, kreiraju obrazovnu scenu i zadovoljavaju obrazovne potrebe, čime snose deo odgovornosti za aktuelno stanje na ovom polju. Oni utiču i na podsticanje tražnje za svojim uslugama generisanjem novih obrazovnih potreba, čime zadovoljavaju sopstvene potrebe za inputom, ali u isto vreme vrše i bitnu društvenu funkciju podizanja obrazovnog nivoa celokupne populacije. Instrument preko koga visokoobrazov-

ne institucije aktivno deluju u svom okruženju i koji će biti predmet naše dalje pažnje, jeste *marketing miks*.

Marketing miks u visokom obrazovanju

Marketing miks predstavlja kombinaciju kontrolisanih elemenata marketinga, kojima se koristi visokoobrazovna institucija da bi postigla očekivani nivo kvantiteta i kvaliteta željenog inputa. U literaturi je uobičajeno identifikovanje četiri elementa marketing miksa tzv. *4p*: proizvod (Product), prodajna cena (Price), distribucija i prodaja (Place) i promocija (Promotion). Alibabićeva (2002) smatra da osnovnim elementima marketing miksa (proizvod, cena, distribucija, promocija) na obrazovnom tržištu treba dodati još jedan – nastavne kadrove. Svi elementi se integrišu i usmeravaju ka korisniku usluge. Praksa je pokazala da bolje rezultate daje kombinacija elemenata marketing miksa, nego oslanjanje na samo jedan element. Kombinacija elemenata marketing miksa mora da bude usklađena sa zahtevima i potrebama korisnika, dok kvalitet kombinacije zavisi od unutrašnjih (kvaliteta kadrova, količine i kvaliteta opreme i sredstava za rad, finansijskog marketinga, snaga menadžmenta) i spoljašnjih faktora (zakonodavno-pravne regulative države, snage i strategije konkurenata, kupaca, partnera itd.).

Proizvod – obrazovna usluga

Obrazovna usluga je planski organizovana aktivnost visokoobrazovne institucije kojoj je cilj da zadovolji određene obrazovne potrebe pojedinca, grupe i društva. Proizvod, tj. usluga je osnovni element marketing miksa i glavni instrument preko koga se zadovoljavaju potrebe korisnika. Klasifikuju se s obzirom na „opipljivost“ ili „opredmećenost“, zavisno od toga u kojoj je meri u pružanju usluge prisutna i prodaja odgovarajućih materijalnih dobara. „Kao niski stepen opipljive usluge smatra se usluga obrazovanja u školama...“ (Jovanović, 2003: 332). Usluge, prema mišljenju Kotlera (Kotler, 2001), imaju četiri glavne osobine koje snažno utiču na oblikovanje programa marketinga: neopipljivost, nedeljivost, nemogućnost čuvanja i raznolikost.

S obzirom na to da su obrazovne usluge neopipljive, pa ih potencijalni korisnik ne može „testirati“ pre nego što donese odluku o ovoj izuzetno važnoj životnoj investiciji (biranja budućeg životnog stila, posla, investiranja „u sebe“, kako iz aspekata materijalnih troškova koje treba uložiti u studiranje tako i iz

aspekta vremena i energije koje ovakva odluka zahteva), jedini sud o njima i njihovom provajderu može steći putem imidža visokoobrazovne institucije.

Upotreba i pružanje usluga dešavaju se istovremeno. U procesu pružanja usluge prisutan je i korisnik usluge i onaj ko je pruža. Upravo njihova interakcija predstavlja jednu od specifičnosti marketinga usluga. Moguće odstupanje u ovom pravilu možemo primetiti kod on-line modela obrazovanja, gde je moguća vremenska asinhronost u pružanju usluge, kao i fizička razdvojenost učesnika razmene. Nemogućnost „čuvanja“ usluge je karakteristika koja proizilazi iz prethodne dve karakteristike. Raznolikost usluge podrazumeva da su usluge vrlo različite, jer zavise od toga ko ih pruža i karakteristika onog ko uslugu koristi. Prisutne su različitosti od institucije koja realizuje visoko obrazovanje, preko nastavnih programa, metoda, nastavnika, do motiva i sposobnosti samih polaznika.

Cena obrazovne usluge

Cena se najčešće definiše kao novčani izraz vrednosti proizvoda/usluge u tržišnoj razmeni. Svaka promena cene utiče na prihod, obim prodaje i troškove poslovanja, a preko njih i na dobit. Cena je jedan od instrumenata marketing miksa koji, korišćen samostalno ili u kombinaciji sa ostalim instrumentima marketing miksa, treba da omogućiti realizovanje ciljeva poslovanja. *Cena je instrument (sredstvo), a ne cilj marketing aktivnosti.* U teoriji marketinga, cene se izučavaju kao značajno sredstvo konkurencije i nezaobilazni instrument marketing aktivnosti (Vasiljević, 2004: 298). Osnovno pitanje koje bi se moglo postaviti u vezi sa ovim elementom marketing miksa je odnos cene i kvaliteta obrazovne usluge. „Zdravorazumsko rezonovanje“, da bi veća cena trebalo da znači i veći kvalitet, u slučaju visokog obrazovanja moglo bi biti dovedeno u pitanje. Za očekivati je da će u zemlji u razvoju (kakva je naša), kao i u uslovima tranzicione ekonomije i globalne krize, ova stavka biti značajna prilikom razmatranja potencijalnog fakulteta, koji bi korisnik mogao da upiše. Vredno je istaći da korisnici često koriste cenu kao vidljivi „objektivni“ element upoređivanja različitosti usluga među ponuđačima.

Promocija fakulteta

„Promociju čini skup različitih komunikacijskih aktivnosti pomoću kojih organizacija, služeći se različitim medijima, ličnim i opštim uverenjima, nastoji

da kupcima svoj proizvod/uslugu učini poznatim i time obezbedi potražnju za njima“ (Jovanović, 2003: 247).

Uloga, mesto i značaj promocije u marketingu organizacije se vidi u tome da proizvođač/ponuđač na različite načine informiše kupce/potrošače o proizvodu/usluzi koju nudi. Pojedini autori radije upotrebljavaju reč komuniciranje nego promocija, jer smatraju da komuniciranje nije toliko usmereno na prodaju, već na obaveštavanje potrošača/korisnika.

Promocija podrazumeva da fakultet poseduje informacije o korisnicima obrazovne usluge, u smislu da je upoznat sa potrebama, očekivanjima i željama korisnika. Visokoobrazovna institucija uspostavlja komunikaciju sa korisnicima obrazovnih usluga primenom različitih sredstava masovne komunikacije (auditivnog, vizuelnog, audio-vizuelnog i grafičkog tipa) i kroz različite oblike (oglas, informator, bilten, web stranica, slogan, logo, promotivne manifestacije, itd.). Promotivne aktivnosti i promotivni materijal imaju dve funkcije: da informišu potencijalne kandidate i da ih animiraju na obrazovnu akciju, odnosno podstaknu da svoje obrazovne potrebe zadovolje baš u instituciji koja se promovise. S toga kreatori promotivnih strategija treba da obrate pažnju kako na informativnost materijala/aktivnosti, tako i na njegovu dopadljivost ciljnoj grupi kojoj je promocija namenjena. Neke od osobenih javnosti kojima obrazovna institucija treba da prilagodi sadržaj i formu promotivnih aktivnosti, prema mišljenju Voćkić-Avdagić (Voćkić-Avdagić, 2004: 69) jesu: unutrašnja javnost (aktivnosti internog marketinga), spoljašnja javnost (potencijalni korisnici obrazovne usluge), stručna javnost i međunarodna javnost (predstavljaju potencijalne saradnike ali i potencijalnu konkurenciju). Jedan od oblika promocije fakulteta je i saradnja (nacionalna i međunarodna) visokoobrazovne institucije sa relevantnim organizacijama i univerzitetima. Najtransparentniji i najlakše uočljiv oblik saradnje ovog tipa su razmene studenata i nastavnog kadra.

Nastavni kadrovi i diplomirani studenti svojom profesionalnošću i radom takođe pozitivno ili negativno promovise visokoobrazovnu instituciju. Neophodno je istaći da koncepcija reklamne akcije u obrazovnoj ponudi „/.../ mora poći od toga da reklama ne nudi samo proizvod ili uslugu, već mnogo više, znanje i umenje, način mišljenja, a time stil i način života. Tvorci reklamnih kampanja u ovoj oblasti treba da utiču na oblikovanje sistema vrednosti“ (Alibabić, 2002: 62).

Distribucija obrazovne usluge

„Distribucija uključuje različite oblike i aktivnosti preduzeća koji obezbeđuju da proizvod /usluga bude dostupan na pravom mestu i u pravo vreme“

(Hanić, 2008: 68). Lokacija pružanja usluge dobija na značaju u konkurentskoj borbi. Ona može biti presudna ukoliko potencijalni korisnik proceni da je kvalitet obrazovne usluge relativno ujednačen kod više institucija koje ih nude. Sa ovom stavkom je povezana i „dodatna vrednost” koju korisnik očekuje od završenog fakulteta. Sigurno je da studiranje u prestonici ili centru neke delatnosti, omogućava sticanje više kontakata važnih za buduću profesiju, nudi veći izbor radnih mesta, određeni stil života i sl. Kotler i Foksova navode da „lokaciju obrazovne institucije predstavljaju ne samo prostor, gde ona stoji, nego i okolina u kojoj deluje, šire područje iz koga dolaze trenutni i potencijalni korisnici obrazovne usluge. Za dobar osećaj i uspešan rad studenata i nastavnog osoblja jako je značajan kvalitet slušaonica, kabineta, opremljenost biblioteka i laboratorija itd.“ (Kotler & Fox, 1985: 15).

Savremeni razvoj tehnologije danas u velikoj meri olakšava distribuciju usluga, a omogućava i stvaranje potpuno novih distribucijskih kanala, poput obrazovanja na daljinu. Ovo znači da realizator i korisnik obrazovne usluge više ne moraju biti fizički prisutni u trenutku pružanja obrazovne usluge. Razvoj tehnologije može predstavljati ili šansu ili pretnju za visokoobrazovnu instituciju, u zavisnosti od strategije koju institucija formuliše, ali i oblasti iz koje fakultet pruža obrazovnu uslugu (hirurgija je primer oblasti koju, na trenutnom nivou razvoja društva, ne bi bilo optimalno realizovati na ovaj način). Ova stavka relativizuje relevantnost lokacije (svi mogu biti prisutni svuda, sedeći u svojoj kući) u užem, fizičkom smislu, ali njena relevantnost u širem smislu, kao okoline u kojoj fakultet deluje, ostaje podjednako, ako ne i više aktuelna (mogućnost delovanja se umrežavanjem povećava).

Direktna isporuka je najpogodnija kada se ne žele ugroziti očekivani standardi kvaliteta. Konačna odluka o izboru kanala distribucije zavisi od vrste usluga, stanja na tržištu, preferencija kupaca/korisnika, zakonske regulative, konkurencije, kvaliteta posrednika itd. U okviru ovog elementa marketing miksa visokoobrazovne institucije svrstavamo u diverzifikovanost u pogledu organizacionih oblika obrazovanja u kojim se obrazovni programi nude, kao i mogućnosti vanrednog studiranja (što je povezano sa prethodnom stavkom).

Nastavni kadrovi

Fakultet predstavlja obrazovnu instituciju u kojoj je obrazovanje fundamentalni proces koji, u operacionalom smislu, čini uslužni proces u kome učestvuju studenti, nastavno i nenastavno osoblje koristeći određena sredstva rada, energiju, informacije i još neke materijalne i nematerijalne inpute. Ključnu kom-

ponentu u realizaciji uslužnog procesa čine kadrovi, odnosno nastavnici u visokoškolskim institucijama.

Iz perspektive korisnika, razlika između srednjih i odličnih uslužnih iskustava leži više u osobi koja ih uslužuje – u njihovoj direktnoj interakciji. Ova osoba otelotvoruje uslugu u potrošačevoj percepciji. Alibabić ističe da kadrovi zaposleni u obrazovnoj instituciji kvalitetom svoga rada, ali i vlastitim imidžom utiču na „popularnost” same institucije. Popularnost određenih nastavnika u naučnim ili stručnim krugovima, ili čak u široj javnosti, može rezultirati željom potencijalnih studenata da se baš posredstvom te ličnosti upoznaju sa nastavnim sadržajem. Stručnost, kako u oblasti u kojoj nastavnik drži predavanje, tako i u oblasti didaktike, mora biti predmet stalnog razvoja i usavršavanja. Ona je toliko bitna za kvalitet nastavnog procesa, da je regulisana i Zakonom o visokom obrazovanju (ko i pod kojim uslovima može da ima nastavničko zvanje i vrši funkciju nastavnika na fakultetima), kao i posebnim statutima visokoobrazovnih institucija.

Marketing miksom do željenog imidža visokoškolske institucije

Imidž je u marketingu *emocionalna predstava* ili slika koju o nekom objektu ima subjekt na osnovu svojih dosadašnjih iskustava, predstava, stavova i mišljenja. Imidž predstavlja moćno sredstvo komunikacije s ljudima. Vasiljev i Salai navode da „.../ kada se u svesti potrošača formira predstava o jednom predmetu s njim se udružuje jedna više-manje zaokružena zamisao, određeni imidž – konglomerat osećanja, mišljenja, činjenica, doživljaja i stavova“ (Vasiljev, Salai, 1993: 39). To znači da korisnik kupuje više od usluge. On kupuje korist, prednost, doživljaj, odnosno, predstavu koja se odnosi na imena, simbole i doživljaje koji, pri donošenju odluka, mogu imati veću težinu od razuma.

Organizacija stvara i oblikuje imidž svojim aktivnostima, kreiranjem adekvatnog proizvoda/usluge, aktivnostima eksternog i internog marketinga, kao i širenjem obrazovne javnosti. Dobar imidž omogućava brže i lakše prepoznavanje i odabir proizvoda/usluga organizacije u „moru“ sličnih. „Poznato je u ekonomskoj teoriji da se imidž organizacije za proizvodnju robe široke potrošnje, stvara pomoću *instrumenata marketing miksa*” (Alibabić, 2002: 61). Pored „imidža konkretne obrazovne institucije postoji i imidž obrazovnog programa ili oblika, kao i imidž delatnosti obrazovanja odraslih uopšte“ (Ibid.). Navedenim „tipovima” imidža treba pridodati i imidž nastavnih kadrova, kao i imidž diplomiranih studenata koji u velikoj meri determinišu celokupan imidž visokoobrazovne institucije.

Pozitivan imidž obrazovne institucije može uticati na nastajanje novih obrazovnih potreba i povećanje motivacije kod potencijalnih korisnika za korišćenjem obrazovnih usluga. Ne postoji jedinstvena kombinacija elemenata marketing miksa kojom se gradi pozitivan imidž visokoobrazovne institucije. Optimalna kombinacija marketing miksa bitno je uslovljena karakterom delatnosti, menadžmentom institucije, ali i tržištem na kojem obavlja svoju poslovnu aktivnost. U želji da odgovorimo na pitanje koji bi međusobni odnos elemenata marketing miksa bio optimalan na domaćem visokoobrazovnom tržištu, preduzeli smo empirijsko istraživanje.

Opis empirijskog istraživanja

Cilj našeg istraživanja je utvrditi procenu značaja pojedinih elemenata marketing miksa kao činilaca izbora fakulteta, procenjenih od strane korisnika usluga visokoškolske institucije – studenata.

Populaciju čine studenti fakulteta u Srbiji, a uzorak broji 260 studenata i stratifikovan je po kategoriji vlasničke strukture fakulteta koji ispitanik pohađa (130 studenata državnih fakulteta i 130 studenata privatnih fakulteta u Beogradu). Ovakvu stratifikaciju napravili smo polazeći od pretpostavke da su studenti privatnih i državnih fakulteta bili vođeni različitim kriterijumima prilikom donošenja odluke o upisu željenog fakulteta.

Što se tiče bližih karakteristika uzorka, možemo reći da su ga većinom sačinjavale osobe ženskog pola (61,15%), studenti čije je stalno mesto prebivališta u gradu (86,54%), kao i oni koji su završili srednju stručnu školu (35,38% je završilo gimnaziju). Roditelji najvećeg broja ispitanika imaju završenu srednju školu i struktura uzorka prema obrazovnom nivou oca je relativno ujednačena sa strukturom uzorka prema obrazovnom nivou majke. U istraživanju je učestvovalo više ispitanika čije studije su organizovane po bolonjskom sistemu (82,69%), a prema statusu finansiranja, većina ispitanika bili su samofinansirajući studenti (55,38%). Većina ispitanika (55,77%) živi u porodicama koje su, u trenutku istraživanja, prihodovale više od 30.000 dinara po članu (15,77% porodica ispitanika ima manje od 15.000 dinara po članu, a 28,46% ima između 15.000 i 30.000 dinara). Uzorak je relativno ujednačen po osnovu kriterijuma upisane godine studija ispitanika (21,15% prva godina; 14,23% druga godina; 23,46% treća godina; 19,23% četvrta godina; 21,92% peta i više godina), a što se tiče dužine studentskog staža, bilo je najviše ispitanika koji studiraju jednu godinu i četiri godine (21,54% jedna godina studiranja; 11,54% dve godine studiranja; 19,62% tri godine studiranja; 19,62% četiri godine studiranja; 15,77% pet godina stu-

diranja; 12,31% šest i više godina studiranja). Poslednja karakteristika uzorka koja nas je interesovala bio je uspeh koji su studenti postigli u dosadašnjem studiranju. U istraživanju je učestvovalo najviše ispitanika sa dosadašnjim prosekom ocena između 7,01 i 8,00 (39,23%), za njima slede studenti sa prosekom između 8,01 do 9 (38,08%), na trećem mestu su studenti sa prosekom između 9,01 i 10 (16,54%), a najmanje je bilo studenata sa prosekom od 6,01 do 7 (6,15%).

Pod pojmom marketing miksa u ovom istraživanju ćemo podrazumevati prilagođeni (modifikovani) marketing miks za usluge visokog obrazovanja koji će obuhvatiti sledeće elemente: a) obrazovnu uslugu, b) cenu obrazovne usluge, c) promociju fakulteta, d) distribuciju obrazovne usluge i e) nastavne kadrove. Ispitanici nisu direktno procenjivali značaj ponuđenih elemenata marketing miksa za izbor fakulteta, već su to, zbog složenosti navedenih elemenata, učinili preko njihovih indikatora, korišćenjem petostepene skale likertovog tipa.

Studenti su *procenu značaja obrazovne usluge* pri izboru fakulteta izrazili preko indikatora: 1) procena adekvatnosti nastavnih programa; 2) procena usklađenosti između nastavnih programa i literature; 3) procena vrednosti i primenljivosti stečenih znanja u praksi; i 4) procena vrednosti diplome visokoobrazovne institucije na tržištu rada.

Značaj cene studija za odabir fakulteta istražili smo preko 3 indikatora: 1) procene značaja visine školarine za izbor fakulteta; 2) procene značaja mogućnosti budžetskog studiranja za izbor fakulteta; i 3) procene značaja mogućnosti eventualnih pogodnosti plaćanja školarine za odabir visokoškolske institucije na kojoj će nastaviti formalno školovanje.

Procena značaja promocije fakulteta za donošenje odluke o izboru fakulteta ispitana je preko sledeća 4 indikatora: 1) procena značaja zastupljenosti fakulteta u medijima za donošenje odluke o upisu; 2) procena značaja saradnje fakulteta sa fakultetima u zemlji i inostranstvu za odlučivanje o instituciji u kojoj će nastaviti obrazovanje; 3) procena značaja saradnje fakulteta sa relevantnim privrednim i društvenim subjektima; i 4) procena značaja oblika promocije za izbor fakulteta.

Procena značaja distribucije obrazovne usluge izvršena je preko 5 indikatora: 1) procene značaja prostornih mogućnosti fakulteta; 2) procene značaja materijalno-tehničke opremljenosti fakulteta; 3) procene značaja prilagođenosti rasporeda predavanja i vežbi potrebama/mogućnostima studenata; 4) procena značaja udaljenosti fakulteta od mesta stanovanja; i 5) procena značaja mogućnosti studiranja na daljinu za donošenje odluke o izboru fakulteta.

Značaj nastavnih kadrova za odabir budućeg fakulteta je procenjen na osnovu 2 indikatora: 1) značaja procene nastavničke kompetentnosti kadrova zaposlenih u visokoobrazovnoj instituciji i 2) značaja imidža nastavnog osoblja za donošenje odluke o tome koji fakultet studirati.

Istraživanje je sprovedeno na državnim (Univerzitet u Beogradu) i privatnim fakultetima (Megatrend, Singidunum i Beogradska bankarska akademija) na teritoriji Beograda u periodu mart – april 2010. godine.

Rezultati empirijskog istraživanja

Rezultati empirijskog istraživanja nedvosmisleno ukazuju na to da su aktuelni korisnici usluga visokoobrazovne institucije izdvojili *obrazovnu uslugu kao najznačajniji element marketing miksa*. Ovaj element marketinškog miksa izdvojio se kao ubedljivo najznačajniji, sa skorom od 2,79 (tabela br. 1). Ubedljivost ovog rezultata potvrđuje podatak da je čak 80% ispitanika iskazalo slaganje sa tvrdnjama koje ukazuju na značajnost ovog elementa (tabela br. 2). Za obrazovnom uslugom slede obrazovni kadrovi (skor 2,53), koje korisnici obrazovne usluge procenjuju kao izuzetno bitne za donošenje odluke o instituciji u kojoj će steći visoko obrazovanje, čime se opravdava svrstavanje ove kategorije u osobenost marketinškog miksa visokoobrazovne usluge. O značajnosti ovog elementa marketinškog miksa govori i podatak da je 57,3% ispitanika potvrdilo značajnost ovog elementa prilikom donošenja odluke o izboru fakulteta. Na trećem mestu po značajnosti za izbor budućeg fakulteta, nalazi se promocija fakulteta (skor 2,43) i slaganjem više od pola ispitanika sa konstatacijom o značajnosti ovog elementa (51,5%).

Tabela br.1: Rang-lista značaja elemenata marketing miksa kao činilaca izbora fakulteta

Rang	Elementi marketing miksa	Aritmetička sredina
1.	Obrazovna usluga	2,79
2.	Nastavni kadrovi	2,53
3.	Promocija fakulteta	2,43
4.	Cena obrazovne usluge	2,40
5.	Distribucija obrazovne usluge	2,25

Cena obrazovne usluge visokoobrazovne institucije našla se na četvrtom mestu sa skorom od 2,40, prema kojem je ova procena vrlo bliska proceni prethodnog elementa (razlika u dobijenim skorovima je 0,03). Ali, ako analiziramo podatke iz tabele br. 2, vidimo da je najveći broj ispitanika (47,3%) neodlučan po ovom pitanju, što čini razliku u skorovima značajnijom.

Na poslednjem mestu po značajnosti za izbor fakulteta nalazi se distribucija obrazovne usluge sa skorom od 2,25 i najvećim brojem ispitanika koji su neod-

lučni kada razmišljaju o značajnosti ovog elementa – 43,8% ispitanika. Vredno je istaći da se u odnosu na druge elemente marketinškog miksa, ovde javio najveći broj ispitanika (15,4%) koji smatraju da ovaj element nije bitan prilikom donošenja odluke o tome na kom će fakultetu nastaviti svoje školovanje.

Neodlučnost najvećeg broja ispitanika po pitanju značajnosti cene i distribucije obrazovne usluge za izbor fakulteta nas dovodi u poziciju u kojoj ne možemo sa sigurnošću tvrditi ni da su ova dva elementa bitna, ni da nisu bitna u donošenju ove važne odluke.

Tabela br. 2: Studentska procena stepena značaja elemenata marketing miksa kao činilaca izbora fakulteta

Elementi marketing miksa	Validni procenti		
	Ne slažem se	Neodlučan/a sam	Slažem se
Obrazovna usluga	1,2 %	18,8 %	80,0 %
Nastavni kadrovi	3,8 %	38,8 %	57,3 %
Promocija fakulteta	8,1 %	40,4 %	51,5 %
Cena obrazovne usluge	6,2 %	47,3 %	46,5 %
Distribucija obrazovne usluge	15,4 %	43,8 %	40,8 %

Analiza i interpretacija rezultata

U želji da što dublje proniknemo u suštinu dobijenih rezultata, u daljoj interpretaciji i analizi rezultata empirijskog istraživanja detaljnije ćemo se baviti rezultatima u vezi sa pojedinim indikatorima elemenata marketing miksa.

Obrazovna usluga se izdvojila kao element marketing miksa koji studenti procenjuju kao najznačajniji pri izboru fakulteta. Većina ispitanika se u potpunosti slaže sa tvrdnjama da stepen korisnosti znanja koja se stiču na fakultetu (87,3% ispitanika) kao i njihova primenljivost u praksi (85,8 % ispitanika), ali i prepoznatljivost diplome fakulteta na tržištu rada (84,2% ispitanika) utiču na izbor fakulteta. Preko 70% ispitanika se u potpunosti slaže da su savremeni, relevantni i po obimu savladivi nastavni programi značajni u izboru fakulteta.

Od prvih deset rangova dimenzija elemenata marketing miksa (od ukupno dvadeset sedam), čak šest pripada različitim dimenzijama obrazovne usluge.

Tabela br. 3: Ostvareni rangovi dimenzija obrazovne usluge

Rang	Dimenzije indikatora procene obrazovne usluge	Aritmetička sredina
1.	Stepen korisnosti znanja koja se stiču na fakultetu	2,82
2.	Primenljivost stečenih znanja u praksi	2,79
4-5.	Prepoznatljivost diplome fakulteta na tržištu rada	2,77
4-5.	Savremenost i usklađenost nastavnih programa sa svetskim standardima	2,77
7.	Relevantnost nastavnih programa koji se obrađuju na fakultetu	2,69
10.	Racionalan i savladiv obim nastavnih programa	2,62
12.	Pokrivenost obrazovnih sadržaja adekvatnom literaturom	2,57

Studenti pri izboru fakulteta u prvi plan stavljaju pragmatične želje. Apolutno zadovoljenje ovakvih želja je praktično nemoguće, zbog delikatne situacije u kojoj se nalazi visoko obrazovanje i kod nas i u svetu (više o ovome u Miljković, 2010), uzrokovano turbulentnim promenama koje se odvijaju u njegovom višesfernom okruženju. Ali određeni pomaci u navedenom pravcu su de facto mogućí, što će fakultete koji ih budu učinili sigurno nagraditi optimalnim inputom (i što se tiče brojnosti i što se tiče kvaliteta). Takođe, treba naglasiti da se procenjeni i visokorangirani kvaliteti obrazovne usluge ne mogu posmatrati odvojeno od drugih elemenata marketing miksa, već isključivo u njihovoj međuzavisnosti. Jer, nastavni programi se ne kreiraju sami, niti se dobijaju gotovi od Ministarstva obrazovanja ili tržišta rada. Njih kreiraju i realizuju nastavni kadrovi visokoškolske institucije, a stepen u kojem će polaznici ovladati predviđenim kompetencijama zavisi pored karakteristika nastavnika i opremljenosti visokoškolske ustanove i od karakteristika studenata koji se obrazuju, jer je obrazovanje u svojoj suštini *partnerski proces*.

Nastavnim kadrovima kao elementu marketing miksa ispitanici pridaju veliki značaj. Na visokorangiranom trećem mestu indikatora elemenata marketing miksa nalazi se odnos nastavnih kadrova prema studentima koji odlikuje kolegijalnost i uvažavanje sa skorom od 2,78. Ovo ukazuje na svest, ali i potrebu korisnika visokog obrazovanja za ravnopravnim (koliko god je to moguće) i kolegijalnim odnosom koji treba da vlada među učesnicima obrazovnog procesa, kako bi proces dao optimalne ishode. O ovome je već bilo dosta reči u andragoškoj literaturi. Indikator koji takođe možemo dovesti u vezu sa prethodno rečenim, je visoko kotiran – na 8. mestu, a odnosi se na poštovanje dogovorenih rokova predavanja, vežbi, konsultacija od strane nastavnog kadra. Ovo još jednom ukazuje na poželjan partnerski odnos među učesnicima obrazovnog procesa. Stručnost nastavnih kadrova je visokorangirana od strane preko 80% ispitanika, što između ostalog upućuje i na potrebu konstantnog INSET-a kadrova. Zanimljiv je nalaz

da se 60 % ispitanika slaže sa tvrdnjom da pozitivna reputacija nastavnih kadrova u stručnim krugovima značajno utiče na izbor fakulteta (17. rang), a da se čak 36,2% ispitanika uopšte ne slaže da je poznatost nastavnog osoblja široj javnosti značajna pri izboru fakulteta – 23. i 24. rang (ali 35,8% ispitanika procenjuje ovaj aspekt kao značajan). Ovo znači da studenti percipiraju stručnost nastavnih kadrova i njihov ugled u profesionalnim krugovima značajnijim od slike koju oni imaju u široj javnosti.

Tabela br. 4: Ostvareni rangovi dimenzija nastavnih kadrova

Rang	Dimenzije indikatora procene nastavnih kadrova	Aritmetička sredina
3.	Odnos nastavnih kadrova prema studentima koji odlikuje kolegijalnost i uvažavanje	2,78
6.	Relevantna stručna znanja nastavnih kadrova	2,76
8.	Poštovanje dogovorenih rokova predavanja, vežbi, konsultacija od strane nastavnog kadra	2,68
17.	Poznatost nastavnog osoblja u stručnim krugovima	2,43
23-24.	Pozitivno mišljenje vama bliskih osoba o nastavnom osoblju	2,00
23-24.	Poznatost nastavnog osoblja široj javnosti	2,00

Ovo se može razumeti posmatrano iz ugla studenta, ali nam se čini nemogućim da potencijalni student (osamnaestogodišnji maturant srednje škole) ima adekvatan uvid u reputaciju nekog predavača u profesionalnim krugovima. Tek tokom studiranja korisnik usluge stiče uvid u stepen uvažavanja konkretnog predavača od strane njegovih/njenih kolega, kvaliteta objavljenih radova, indeks citiranosti i slično.

Uticaj *promotivnog* miksa na izbor fakulteta je procenjivan iz aspekta percepcije zastupljenosti fakulteta u medijima, saradnje fakulteta sa fakultetima u zemlji i inostranstvu, saradnje fakulteta sa relevantnim privrednim i društvenim subjektima, kao i procene informativnosti i dopadljivosti različitih oblika promocije. Preko 70% ispitanika se u potpunosti slaže sa tvrdnjom da je saradnja fakulteta sa drugim fakultetima (rang 11), kao i društvenim i privrednim organizacijama značajna pri izboru fakulteta (9. mesto rang-liste – tabela br. 4). Ovo znači da se fakulteti moraju umrežavati sa različitim socijalnim partnerima ukoliko žele da (p)ostanu atraktivni svojim budućim korisnicima, ali i da na druge fakultete moraju početi da gledaju i kao na potencijalne partnere, a ne samo kao na konkurente (ili ih potpuno ignorisati, što je najgora moguća opcija).

Tabela br. 5: Ostvareni rangovi dimenzija promocije

Rang	Dimenzije indikatora procene promocije	Aritmetička sredina
9.	Saradnja fakulteta (studentske prakse, studentske posete, gostujuća predavanja) sa relevantnim privrednim i društvenim subjektima	2,67
11.	Saradnja fakulteta (razmena studenata, razmena nastavnog osoblja) sa fakultetima u zemlji i inostranstvu	2,57
14.	Informativnost različitih oblika promocije	2,51
19.	Dopadljivost različitih oblika promocije	2,35
21.	Pojavljivanje fakulteta u medijima u pozitivnom kontekstu	2,33
26.	Prisutnost fakulteta u medijima	1,85

Na 14. mestu rang-liste nalazi se informativnost različitih oblika promocije, dok se na 19. mestu nalazi dopadljivost različitih oblika promocije. Ova dva indikatora čine međusobno komplementarnu celinu koja determiniše izbor oblika i sadržaja promocije. Promocija predstavlja dvosmernu komunikaciju u procesu razmene (marketingu), pri čemu informativnost komunikacije dolazi u prvi plan, što potvrđuje 61% ispitanika koji procenjuju značajnom informativnost različitih oblika promocije (web stranica, informator, bilten, slogan, logo, promotivne manifestacije). Na drugom mestu je dopadljivost ovih oblika promocije. To ne znači da ovaj segment promocije treba zapostaviti, o čemu govori 51,2% ispitanika, koji smatraju da oblici promocije moraju biti i dopadljivi.

Na začelju prioriteta studenata nalazi se pozitivna slika fakulteta u medijima (21. mesto) i tvrdnja da ona može oblikovati odluku o izboru (56% ispitanika se u potpunosti slaže). Ovo je verovatno zato što se pozitivna slika podrazumeva. Možda bi slika o značajnosti ovog indikatora za donošenje odluke o izboru budućeg fakulteta bila drugačija da je pitanje bilo formulisano u određenom obliku – koliko negativna slika utiče na izbor.⁴

U prilog tome govori i već pomenuta, visokorangirana želja o prepoznatljivosti diplome fakulteta na tržištu rada, što se „prodavanjem“ diploma može dovesti u pitanje.

Pomalo je iznenađujuće da se cena obrazovne usluge javlja kao pretposljednja stvar o kojoj studenti razmišljaju kada biraju fakultet, s obzirom na globalnu i nacionalnu ekonomsku krizu i relativno učestale proteste studenata po ovom pitanju. Iznos visine školarine je prema važnosti zauzeo 22. mesto od mogućih 27, a čak 26,9 % ispitanika smatra da iznos školarine uopšte nije značajan pri izboru fakulteta, 20% ispitanika je neodlučno, dok 53,1% ispitanika smatra da visina školarine utiče na izbor fakulteta. Najbolje rangirani indikator cene – mogućnost budžetskog studiranja našao se na 13. mestu rang-liste, a dve trećine (66,2%)

⁴ Dovoljno je setiti se afere „Indeks“ na Univerzitetu u Kragujevcu (videti: <http://www.naslovi.net/tema/35370>)

studenata smatra da je ovaj indikator značajan pri izboru fakulteta, dok nešto manji broj njih 50%, procenjuje da su pogodnosti plaćanja školarine značajne pri izboru budućeg fakulteta.

Tabela br. 6: Ostvareni rangovi dimenzija cene

Rang	Dimenzije indikatora procene cene	Aritmetička sredina
13.	Mogućnost budžetskog studiranja	2,52
20.	Pogodnosti u plaćanju školarine	2,34
22.	Iznos visine školarine	2,26

Ovaj nalaz ima nekoliko mogućih implikacija. Skloni smo verovanju da je ovakav rezultat posledica stratifikacije uzorka na privatne i državne fakultete, tako da imamo veći broj samofinansirajućih studenata (55,38%) koji su, očigledno, u mogućnosti da plate školovanje i kojima ova stavka ne predstavlja problem. O ovome svedoči i činjenica da većina studenata (55,77%) potiče iz porodica koje u trenutku istraživanja, imaju mesečni prihod veći od 30.000 dinara *po članu*. U trenutku istraživanja prosečna neto zarada u Republici Srbiji (prema web sajtu revizorske kuće „DST-Revizija“ d.o.o., <http://revizija-dst.co.rs>) iznosila je 33.508 dinara u martu, odnosno 34.952 dinara u aprilu 2010. godine (odnosno, u mesecima kada je istraživanje sprovedeno). Ovo znači da naši ispitanici većinom potiču iz višeg ekonomskog sloja našeg društva, što može pokrenuti brojna sociološka, ali i andragoška pitanja. Među njima se po svojoj važnosti, nameće pitanje o ravnopravnoj dostupnosti obrazovanja u našem društvu, kao i klasno uslovljenim ciljevima marketinga koji treba da zadovolji te ciljeve, i koji pored njih ima često oprečne šire društvene ciljeve – ravnopravnost, demokratiju, održivi razvoj i sl. To je još jedna od karakteristika specifične nezavidne pozicije fakulteta u savremenom društvu, koji je prinuđen da balansira između krajnosti i da čini kompromise, što znači da ne može do kraja zadovoljiti očekivanja ni jedne ni druge strane.

Optimističnije tumačenje bilo bi ono u kojem su ispitanici prepoznali značaj investiranja u sopstveno visoko obrazovanje, smatrajući da je ono toliko značajno za njihov budući život, da se kvalitet stavlja na prvo, a novac tek na četvrto mesto prilikom odlučivanja o upisu fakulteta.

Element koji je najlošije rangiran na rang-listi značaja dimenzija indikatora elemenata marketing miksa je *distribucija obrazovne usluge*. Najbolje rangiran indikator ovog elementa marketing miksa nalazi se na 15. mestu i odnosi se na procenu značajnosti adekvatnih prostornih mogućnosti za uspešno realizovanje nastave. Preko 60% ispitanika smatra da je materijalno-tehnička opremljenost slušaonica, kabineta, laboratorija, biblioteka značajna pri izboru fakulteta. Mo-

gućnost prilagođavanja predavanja i vežbi potrebama/mogućnostima studenata je odmah iza prethodnog indikatora na rang-listi i utiče na odluku o izboru fakulteta (63,1% ispitanika se u potpunosti slaže sa tvrdnjom). Ovo znači da studenti sopstveno vreme posmatraju kao dragoceni resurs sa kojim očekuju da se visoko-obrazovna institucija odnosi sa poštovanjem i obzirom. Zato donekle čudi da se mogućnost studija na daljinu (kao vremenski najfleksibilniji oblik) našla tek na 25. mestu rang-liste, među najmanje značajnim činiocima odluke. Iako, 38,8 % ispitanika procenjuje mogućnost studija na daljinu neznačajnom, 35% ispitanika se u potpunosti slaže da bi ova opcija mogla da utiče na izbor korisnika obrazovnih usluga. Ova činjenica može imati veliki andragoški značaj. Smatramo da ona govori više o nepoverenju studenata tradicionalno koncipiranih fakulteta u ovaj oblik obrazovanja, ili u vrednost ovako stečene diplome, ili u trenutnu sposobnost naših fakulteta da na odgovarajući način realizuju ovako koncipirane studije. Vrlo je moguće da sve tri mogućnosti utiču na to da studenti trenutno ne razmišljaju masovno o ovoj opciji, ali smo mišljenja da neće još dugo biti tako i da bi fakulteti mogli ovu opciju ozbiljnije da razmotre, s obzirom na to koliki potencijal nudi u uspostavljanju nacionalne i internacionalne saradnje u svim oblastima. U eri opšte pokretljivosti, ovo nam se čini kao realna konkurentna prednost (pod uslovom da su preduslovi ostvarivanja optimalnog kvaliteta zadovoljeni). Vredi na ovom mestu istaći još jednu ogradu: ne raspoložemo informacijom koliki broj studenata u Srbiji trenutno studira na domaćim i stranim fakultetima koristeći on-line put. Ovo je izuzetno bitno, jer su naš uzorak činili studenti tradicionalnih fakulteta, kojima očigledno ovakva mogućnost nije bila naročito privlačna i bitna, a da su oni kojima je ovo bila vrlo važna stavka prilikom izbora fakulteta ostali skriveni od naših pogleda.

Tabela br. 7: Ostvareni rangovi dimenzija distribucije

Rang	Dimenzije indikatora procene distribucije	Aritmetička sredina
15.	Aдекватne prostorne mogućnosti za uspešno realizovanje nastave	2,49
16.	Prilagođenost rasporeda predavanja i vežbi mogućnostima/potrebama	2,44
18.	Tehničko-materijalna opremljenost kabineta	2,42
25.	Mogućnost studija na daljinu	1,96
27.	Blizina fakulteta mestu stanovanja	1,80

Blizina fakulteta je indikator koji se na poslednjem mestu uzima u razmatranje prilikom donošenja odluke. Ovo znači da fakulteti bez obzira na lokaciju i geografski položaj, ukoliko nude vrhunski kvalitet obrazovne usluge uz izvanredne obrazovne kadrove, dobru promociju i relativno pristupačnu cenu, mogu

računati na korisnike. Loša lokacija je u ovom slučaju samo loš izgovor za loše poslovanje.

Zaključak

Turbulentnost, umreženost i globalizacija postali su konstantno obeležje višesfernog okruženja visokoobrazovne institucije. Pluralizacija (visokog) obrazovanja nužno dovodi do povećanja broja institucija koje se primarno bave obrazovanjem, kao i diverzifikovanosti obrazovnih programa koji se nude, što neumitno vodi ka njihovom naglašenom konkurentskom odnosu. Efekti pluralizacije su povećanje mogućnosti izbora potencijalnog korisnika obrazovne usluge i mogućnosti zadovoljavanja šireg spektra obrazovnih potreba, ali i povećanje kvaliteta obrazovanja, koji bi trebalo da se javi kao posledica „prirodne selekcije“ u ovoj oblasti. S obzirom na to da je obrazovanje neopipljiva usluga o čijem se kvalitetu ne može suditi na osnovu preliminarnog testiranja (konzumiranja), zanimalo nas je koji elementi marketinškog miksa vode potencijalnog korisnika prilikom donošenja odluke o upisu konkretnog fakulteta. Očigledno je da imidž visokobrazovne institucije predstavlja element koji igra bitnu ulogu u donošenju ovako važne odluke, a elementi marketing miksa upravo čine sredstva kojima se imidž formira. Rezultati empirijskog istraživanja ukazuju da studenti na prvo mesto stavljaju kvalitet obrazovne usluge, pri čemu očekuju da je obrazovanje pragmatično i utilitarno, odnosno, stepen korisnosti znanja i primenljivost stečenih znanja u praksi su najbolje rangirani u njihovim očima. Za izbor fakulteta vrlo značajnim su se pokazali i nastavni kadrovi, koji su opravdali sopstveno svrstavanje u elemente marketinškog miksa. Nastavni kadrovi fakulteta su ključni visokorangirani element koji se nalazi u funkcionalnim i proaktivnim odnosima sa ostalim elementima marketinškog miksa. Studenti u prvi plan ovog elementa marketing miksa stavljaju odnos nastavnih kadrova prema studentima (koji treba da odlikuje kolegijalnost i uvažavanje), čak ispred stručnosti nastavnih kadrova, što je takođe bitan prostor u kome fakulteti i njihovi kadrovi mogu da ostvare napredak. Studenti imaju svest da im je od male koristi visokostručni, možda čak i genijalni nastavnik, koji je nedostupan, gord, autarkičan i dalek. Upravo je odnos nastavnik – polaznik ključan za uspeh nastavnog procesa, što je jedan od osnovnih andragoških postulata.

Promocija, kao oblik komunikacije između visokoobrazovne institucije i potencijalnih korisnika njene usluge, nalazi se na trećem mestu prema važnosti koju ima u donošenju odluke o instituciji na kojoj će se steći fakultetska diploma. U okviru ovog elementa kao najbitniji su procenjeni saradnja fakulteta sa

relevantnim privrednim i društvenim subjektima, kao i sa drugim fakultetima u zemlji i inostranstvu. Moramo naglasiti da ove karakteristike jednim svojim delom spadaju i u karakteristiku obrazovne usluge, i da kao takvi, potencijalnom studentu predstavljaju određenu garanciju kvaliteta – relevantni partneri (prestižni privredni i društveni subjekti i drugi fakulteti optimalnih karakteristika i reputacije) neće stupiti u partnerski odnos sa fakultetom koji to ne zaslužuje.

Na začelju prioriteta koji se razmatraju prilikom odabira konkretnog fakulteta nalaze se novac koji treba izdvojiti za školarinu, kao i indikatori u vezi sa distribucijom obrazovne usluge. Ne sumnjajući u ispravnost dobijenih rezultata, smatramo poželjnim da na ovom mestu stavimo ogradu i kažemo da su možda određene karakteristike uzorka istraživanja determinisale ovakve rezultate. Kao prvi razlog izražavanja određene rezerve prema „apsolutnosti“ ovakvih rezultata istakli bismo to što su nam uzorak bili studenti – aktuelni korisnici usluge, koji uslugu koriste različiti vremenski period (neki i preko 6 godina), te je to mogao biti razlog određene distorzije u njihovom mišljenju i sećanju. Postavlja se pitanje da li bi potencijalni korisnici usluge na isti način rangirali elemente marketing miksa kao oni koji već koriste obrazovnu uslugu. Drugi, ne manje bitan razlog rezerve ove vrste imamo u nereprezentativnosti uzorka po pitanju finansijskog stanja porodice ispitanika, koji ima veća primanja u odnosu na prosek Srbije. Treći razlog je to što su korisnici on-line načina studiranja ostali van našeg horizonta posmatranja, takođe zbog karakteristika uzorka.

Uprkos navedenim ogradama, smatramo da se dobijeni rezultati mogu koristiti u uspešnijem kreiranju marketinškog miksa naših fakulteta, pri čemu briga o kvalitetu obrazovne usluge ipak mora biti na prvom mestu. Ostali elementi marketing miksa moraju biti prvenstveno u funkciji poboljšanja ovog najbolje rangiranog elementa.

Takođe, želimo da naglasimo da u ovoj oblasti nema jednog uspešnog, „konzerviranog“ recepta koji se može primenjivati u svim situacijama. Optimalna kombinacija elemenata marketing miksa bitno je uslovljena karakterom delatnosti, menadžmentom institucije, ali i tržištem na kome visokoobrazovna institucija obavlja svoju aktivnost. Konstantnost promena okruženja čini istraživanja ovog tipa ne samo poželjnim, već i nužnim.

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Elements of the Marketing Mix as Factors for Higher Education Institution Choice⁷

Abstract: Using social marketing orientation and the „partnership model“ in higher education is a prerequisite for the survival of faculties in postmodern society, but also an opportunity to increase the quality of their functioning. In this paper, we analyze the role and importance of the marketing mix, as a key instrument in achieving the desired exchange between faculties and users of their services - students. We also had presented the empirical research results. On basis of results, we identify how users of higher education institutions services consider the importance of certain marketing mix elements, in making choice of their future faculty.

Key words: marketing mix, higher education institution, educational service.

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Razvoj institucije stalnog stručnog nadzora nad osnovnim školama u Srbiji u XIX veku²

Apstrakt: U ovom radu predstavili smo razvoj institucije školskog nadzora nad osnovnim školama u Srbiji u XIX veku. Na osnovu analize normativnog okvira školskog nadzora (školskih zakona, uputstava i propisa), izveštaja školskih nadzornika i beležaka učitelja o karakteru školskog nadzora, nastojali smo da rasvetlimo i objasnimo promene u koncepciji nadzora nad osnovnim školama. Naša analiza je pokazala da je školska revizija u Srbiji započela kao upravni nadzor, koji je bio u funkciji kontrole rada škola i učitelja, a da je devedesetih godina XIX veka preovladao koncept stalnog stručnog nadzora sa naglašeno instruktivnom funkcijom – ovaj nadzor imao je za cilj da unapredi kvalitet nastavnog rada i osposobljenost učitelja. Promene u koncepciji školskog nadzora odlikavaju se i u različitim nazivima ove institucije: najpre su nadzor vršili upravitelji, direktori, inspektori, revizori i staratelji, da bi se krajem XIX veka ustalio izraz školski nadzornici.

Ključne reči: istorija školstva, školski nadzor, osnovne škole.

Uvod

U protekloj deceniji učinjen je značajan pomak u teorijskom pristupu istoriji obrazovanja u Srbiji XIX i prve polovine XX veka, koja se, pre svega u radovima Lj. Trgovčević i A. Đurovića (Trgovčević, 2003; Đurović, 2004), sagledava u kontekstu društvene modernizacije. Proces diferencijacije sistema obrazovanja kao modernog društvenog sistema, kao što je poznato iz fundamentalnog rada na ovu temu nemačkog sociologa Niklasa Lumana, uvek je praćen formiranjem „obrazovnog establišmenta”. (Luhmann, 1998) Neposredna istraživanja nastanka

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i funkcionisanja prosvetne administracije u Srbiji nisu vršena, mada postoje brojni nalazi koji ukazuju na njenu neefikasnost.

Nadzor nad školama, takođe, nije privukao veću pažnju istoričara obrazovanja, iako se izveštaji školskih nadzornika obilato koriste u njihovim radovima. Tako je književna slika školske revizije u pripovetkama Milovana Glišića i Radoja Domanovića ostala najupečatljivije svedočanstvo o procesu koji je doveo do konstituisanja modernih („istraživačko-konsultativnih”) profesija u obrazovanju.

U ovom radu nastojali smo da rasvetlimo i objasnimo promene u karakteru nadzora nad osnovnim školama u Srbiji u XIX veku na osnovu analize normativnog okvira školskog nadzora (zakona i uputstava), izveštaja školskih nadzornika i učiteljskih kritika na račun prakse nadzora. Posebno smo istakli blizak odnos koji je postojao između potrebe države da obezbedi kontrolu kvaliteta obrazovnog procesa i ličnih i profesionalnih ambicija učitelja. Upravo je napetost između ovih aktera obeležavala debatu o pitanju školskog nadzora u srpskom društvu i uticala na donošenje političkih odluka.

Školski nadzor u Srbiji u periodu od 1832. do 1870. godine

Početak školskog nadzora u Srbiji vezuje se za Atanasija Teodorovića, *upravitelja normalnih škola u Beogradu*, koga je knez Miloš na ovu funkciju postavio 21. aprila 1832. godine.³ Krajem školske 1831/32. godine A. Teodorović održao je godišnji ispit u beogradskoj osnovnoj školi. U izveštaju iz ove revizije, od 31. avgusta 1832. godine, upravitelj je kritičan prema „detetonastavniku” Tomi Solaru: beleži da se katehezis ne uči u potrebnom obimu, da su deca slaba u nemačkom jeziku, da su mlađi učenici iz računa naučili jedino da razlikuju cifre...⁴

Godine 1836. (21. marta) ustanovljena je funkcija *direktora sviju škola* na koju je postavljen Petar Radovanović. Za *direktora* je doneto posebno *Nastavlenije* kojim je definisano da je on „/.../ starešina sviju učitelja u Srbiji, on motri nad ispunjenijem njini dužnosti, da umejuće i pogrešavajuće ispravlja i voobšte nastoji, da škole normalne budu u redu, i da se junost u njima celishodno vaspitava”.⁵ *Nastavlenijem* je uvedena funkcija *mesnih nadziratelja* koje je postavljao direktor

³ Postavljenje Atanasija Teodorovića za profesora Velike škole i nadziratelja normalnih škola (21. april 1832. god.). U: T. Dragičević i S. Timotijević (u red.) (2009). *Školstvo i prosveta u Srbiji 1817–1838*. Beograd: Arhiv Srbije, str. 16–18.

⁴ Izveštaj Atanasija Teodorovića, upravitelja normalnih škola u Beogradu o uspehu učenika (31. avgust 1832. god.). U: T. Dragičević i S. Timotijević (u red.) (2009). *Školstvo i prosveta u Srbiji 1817–1838*. Beograd: Arhiv Srbije, str. 16–18.

⁵ Nastavlenie Direktoru sviju škola u Knjaževstvu Srbije (21. mart 1836. god.). U: T. Dragičević i S. Timotijević (u red.) (2009). *Školstvo i prosveta u Srbiji 1817–1838*. Beograd: Arhiv Srbije, str. 134–137.

iz redova sveštenstva i uglednijih građana. Njihov je zadatak bio da prate rad škole i učitelja i to bez ikakve nadoknade. Direktor sviju škola, P. Radovanović, izvršio je prvu reviziju škola krajem školske 1835/36. godine – obišao je 68 škola u kojima je bilo 2.273 učenika.⁶ Njegov izveštaj sadrži podatke o školama koje je obišao (mesto i srez u kome se škola nalazi, da li je škola državna ili opštinska, da li ima mlađu i stariju klasu), o starosti učitelja, njihovom poreklu i bračnom statusu i o tome koliko dugo rade kao učitelji. Takođe, P. Radovanović je zabeležio svoju procenu „sposobnosti i vladanja učitelja” i kratko zapažanje o njihovom obrazovanju, odnosu sa meštanima, eventualnim krivicama i kaznama. Direktor je procenio da je od 68 učitelja samo njih 16 sposobno da radi u starijoj klasi normalne (osnovne) škole, a da bi se od preostalih 52 učitelja tek nekolicina mogla usavršavanjem osposobiti za taj rad.

Nakon donošenja Turskog ustava 1838. godine ustanovljena je Visoka kancelarija prosvetljenija i saniteta kojom je rukovodio Stefan Stefanović Tenka u funkciji *popočitelja prosvetljenija i vrhovnog nadziratelja karantina*. Za narednu školsku godinu, u cilju efikasnije uprave i nadzora nad školama, Srbija je podeljena na dva okruga, istočni od Beograda ka Timoku i zapadni od Beograda ka Drini, a školski nadzor u školskoj 1837/38. godini obavili su S. Stefanović i Konstantin Branković, profesor filozofije na Liceju.

Značajnije izmene u organizaciju školskog nadzora unete su *Ustrojenijem javnog učilišnog nastavljenija* iz 1844. godine. Ovim opštim školskim zakonom nadzor nad osnovnim školama regulisan je na sledeći način: postoji mesni upravitelj na nivou opštine, u čijem je delokrugu da se stara o školskim potrebama i dva *glavna upravitelja* koji vrše upravni nadzor – staraju se o tome da se poštuju školski zakoni i propisi, prisustvuju godišnjim ispitima i ocenjuju rad učitelja.⁷ Potom je 1853. godine ustanovljeno zvanje *glavni inspektor učilišta*. Na ovo mesto postavljen je Platon Simonović za koga je izašlo posebno „nastavljenije”. Uputstvom za glavnog inspektora određeno je da on svake godine treba da poseti nekolicinu osnovnih škola i tako za pet godina obiđe sve škole u Srbiji.

Preustrojenijem višeg nadzirateljstva i uprave školske od 22. avgusta 1857. godine učinjeni su prvi koraci u pravcu centralizacije školskog nadzora. Ovim zakonom ukinute su funkcije *glavnog inspektora učilišta* i *glavnuh upravitelja*, a Popočiteljstvo prosvetljenija preuzelo je da preko *četiri sekretara* vrši neposredan

⁶ Spisak sviju, u pravitelstvenim i obšetstvenim školama Knjaževstva Srbije naodeći se učitelja (20. juli 1836. god.). U: T. Dragičević i S. Timotijević (u red.) (2009). *Školstvo i prosveta u Srbiji 1817–1838*. Beograd: Arhiv Srbije, str. 134–137.

⁷ *Ustrojenije javnog učilišnog nastavljenija*, 1844, str. 325–328.

nadzor nad školama.⁸ O ovim izmenama dr Nikola J. Petrović piše: „Koliko sam saznao, ukidanje glavnih upravitelja škola bila je stvar ličnih obzira. Radovanović beše umro. Samo je bio g. Milovan Spasić kao jedini glavni upravitelj. U ono doba on nekako avanzova za načelnika popečiteljstva prosvete i tako je nestalo ljudi za glavne upravitelje. Zakon je kazao samo ono što je već bilo postojalo”.⁹

Centralizacija školskog nadzora koja je uvedena zakonom iz 1857. godine potvrđena je *Zakonom ustrojstva osnovi škola* iz 1863. godine kojim su nadzor nad osnovnim školama preuzela *dva sekretara* Ministarstva prosvete i crkvenih dela. Sekretari su obilazili škole po Srbiji na kraju školske godine ili su pozivali učitelje da dođu u veće mesto i donesu protokole iz kojih se moglo videti šta su radili. Njihov osnovni zadatak bio je da ocene rad učitelja. S druge strane, i država i opštine bile su zainteresovane jedino za to da učitelj dobije pozitivnu ocenu i da škola nastavi sa radom. Malo ko je obraćao pažnju na to kako izgleda nastavni rad učitelja. Kada je u Srbiju 1868. godine došao Đorđe Natošević, posle obilaska škola u beogradskom okrugu podneo je izveštaj u kome je stanje u školama ocenio kao veoma loše: „I opet moram da izjavim da ni u onim najboljim uslovima nikakve koristi ne vidim. Celo je ovo znanje samo prividno, samo spolja za decu prilepljeno. Deca ni malo svesti nemaju o onome što znaju, zato su već sada gotovo sve zaboravila što su prvog tečaja sa onoliko naprezanja naučila. Šta god da se ovako samo mehanički na izust uči i zna, mora se za malo vremena sve zaboraviti.”¹⁰

Možemo da zaključimo da je nadzor nad osnovnim školama u Srbiji u periodu 1832–1870. godine započeo kroz funkciju *upravitelja normalnih škola* i *direktora sviju škola* koji su bili direktno odgovorni knezu, da bi pedesetih godina prešao u ruke Popečiteljstva prosvete i da je revizija dominantno imala karakter upravnog nadzora – cilj je bio da se obezbedi poštovanje školskih zakona i propisa i oceni rad učitelja. Školski revizori imali su zadatak da na kraju školske godine ispitaju i ocene znanje učenika. Budući da još uvek nije bila razvijena svest o značaju načina na koji učitelj dolazi do rezultata, revizori se nisu bavili nastavnim radom učitelja. Verovalo se da je znanje koje učenici pokažu na ispitu jedini dobar pokazatelj kvaliteta rada učitelja.

⁸ Preustrojenje višeg nadzirateljstva i uprave školske. U: *Zbornik zakona i uredbi i uredbeni propisa u Knjaževstvu Serbskom*, Beograd, 1957.

⁹ Petrović, J. N. (1880). „Školski nadzor”. *Prosvetni glasnik*, sv. IV, str. 167.

¹⁰ Čunković, S. (1971). *Školsktvo i prosveta u Srbiji u XIX veku*. Beograd: Pedagoški muzej, str. 85.

Karakter nadzora nad osnovnim školama u periodu od 1870. do 1890. godine

Kritička zapažanja Đ. Natoševića o školama koje je obišao, iako su naišla na osudu prosvetnih vlasti, doprinela su intenziviranju napora na reformi osnovnoškolske nastave. Prvi korak u tom pravcu bilo je osnivanje Učiteljske škole u Kragujevcu 1871. godine. Za školovane učitelje bili su potrebni jednako spremni nadzornici. U školskoj 1871/72. godini ministar prosvete S. Novaković odustao je od prakse da reviziju vrše isključivo činovnici ministarstva. U nadzor je kao svoje izaslanike, pored sekretara ministarstva prosvete i crkvenih dela, Milorada Popovića Šapčanina i Milana Đ. Milićevića, poslao profesore srednjih škola, a ovaj model nadzora zadržali su i docniji ministri.¹¹

Godine 1880. ministar S. Bošković potpisao je prvo uputstvo za školske nadzornike. *Uputstvom g.g. izaslanicima ministarstva prosvete i crkvenih poslova koji će pregledati škole u Srbiji 1880. godine* od izaslanika se tražilo da u osnovnim školama prate „opšte stanje” u nastavi, uspeh učenika i poštovanje školskih zakona i propisa. Preporučuje se da izaslanik prisustvuje godišnjem ispitu svih učenika u osnovnoj školi da bi na taj način utvrdio šta je učitelj predavao i da li se pridržavao nastavnog plana, da prati na koji način učitelj ispituje i objašnjava na ispitu, da pregleda da li škola ima potrebna nastavna sredstva i da li su učenici redovno pohađali nastavu. Takođe, izaslanik je imao zadatak da pregleda dnevnik predavanja i prozivki, spisak kazni, inventar stvari i knjiga, školsku zgradu (školski nameštaj, higijenu školske zgrade i dvorišta) i da razdeli knjige najuspešnijim učenicima.¹²

Dalje izmene karaktera nadzora nad osnovnim školama, i to u pravcu zasnivanja stalnog stručnog nadzora, učinjene su na inicijativu ministra prosvete i crkvenih dela S. Novakovića koji je 21. marta 1881. godine doneo *Zakon o nadziranju škola*.¹³ Ovim zakonom određeno je da nadzor u osnovnim školama vrše „lica iz prosvetne struke”, pre svega profesori učiteljske i srednjih škola. Nadzor je i dalje imao funkciju ocenjivanja učitelja i zato je bilo uređeno da nadzornik obilazi škole na kraju školske godine i prisustvuje godišnjim ispitima (predviđene su ocene od 1 do 5 – rđav, slab, dobar, vrlo dobar i odličan). *Zakonom o nadziranju škola* definisano je da nadzornike postavlja ministar prosvete i crkvenih dela na predlog Glavnog prosvetnog saveta (koji je ustanovljen 1880. godine), a njihov

¹¹ „Školski revizori za 1872. godinu“, *Škola*, 1872, god. V, br. 13, str. 208.

¹² „Uputstvo g.g. izaslanicima ministarstva prosvete i crkvenih poslova koji će pregledati škole u Srbiji 1880. godine“, *Prosvetni glasnik*, 1880, god. I, sv. 2, str. 40–41.

¹³ „Zakon o nadziranju škola“, *Prosvetni glasnik*, 1881, god. II, sv. 7, str. 235–236.

broj da se određuje prema potrebi. Za školsku 1880/81. godinu imenovano je 24 nadzornika.¹⁴

Budući da je zakonom bilo određeno da se za nadzornike biraju lica iz prosvetne struke postavilo se pitanje da li su učitelji kompetentni da preuzmu ovu funkciju. Iz učiteljstva su stizali zahtevi da se nadziranje osnovnih škola prepusti iskusnim učiteljima, ali je u Glavnom prosvetnom savetu preovladavao stav da dužnost nadzornika treba da obavljaju srednjoškolski profesori sa visokim obrazovanjem. Na listi nadzornika za školsku 1880/81. godinu nije bio ni jedan učitelj, a školske 1881/81. postavljen je za nadzornika samo jedan, učitelj iz Loznice, Milan Nastović.¹⁵

Godine 1881. učitelji u Srbiji osnovali su Učiteljsko udruženje koje je 1882. godine pokrenulo staleški list „Učitelj”. Preko ovog časopisa učitelji počinju aktivno da učestvuju u raspravi o uređenju školskog nadzora. Već u drugom broju „Učitelja” izašao je članak o školskom nadzoru koji je potpisan inicijalima D.T.M., u kome se traži uvođenje stalnog stručnog nadzora koji bi obavljali učitelji sa završenom učiteljskom školom.¹⁶ Iste godine izašao je članak anonimnog autora u kome se u prilog stalnom stručnom nadzoru navodi: „Prestalo bi se sa krparenjem pouke nad nespremnim nastavnicima koja se sa onako lošim rezultatima vrši za vreme velikog školskog odmora, ta bi pouka postala redovan posao stalnih školskih nadzornika /.../ Nastala bi prava revizija u svako doba godine u kojoj bi se učitelji ocenjivali na svom poslu; znali bi se pouzdano svi uzroci nepostignutog uspeha u školskom radu pojedinih nastavnika, otklanjale bi se sve moguće smetnje za vremena; /.../ otklonilo bi se i ovo svakidašnje biranje revizora, pri kome hotimično ili nehotično upadne i priličan broj ljudi za koje su rad u osnovnoj školi i sve teškoće koje su sa tim radom skopčane, kao i psihološki procesi dečjeg razvitka, da ne rečemo što više, veoma malo poznati; /.../ ojačala bi u narodu svest o važnosti školovanja”.¹⁷

Kada je 1881. godine institucija nadzora nad osnovnim školama dobila zakonski okvir (donošenjem *Zakona o nadzoranju škola*) u prosvetnim krugovima se očekivalo da je to prvi korak ka ustanovljenju stalnog stručnog nadzora koji bi bio više u funkciji unapređivanja rada učitelja, a ne samo njihovog ocenjivanja. Međutim, *Zakon o osnovnim školama* od 31. decembra 1882. godine nije zadirao u karakter nadzora. Školska revizija je po ovom zakonu ostala u rukama profesora učiteljske i srednjih škola, a zadaci nadzornika ostali su isti: da oceni rad učitelja ocenom od 1 do 5, da nadgleda redovnost pohađanja nastave, da prati u kakvom

¹⁴ „Postavljenja školskih nadzornika za godinu 1880–81”, *Prosvetni glasnik*, 1881, god. II, sv. 9, str. 316.

¹⁵ „Nadzornici za osnovne škole za 1881–82. školsku godinu”, *Prosvetni glasnik*, 1882, god. III, sv. 9, str. 269.

¹⁶ D.T.M. (1882). „Nadzor u osnovnoj školi”, *Učitelj*, god. I, br. 2, str. 37–39.

¹⁷ „Pred reviziju”, *Učitelj*, 1882, god. I, br. 15, str. 233.

su stanju školske zgrade i školska dvorišta, snabdevenost škole nastavnim sredstvima...¹⁸ Izvesne izmene u karakter nadzora unete su preko *Uputstva za nadzornike osnovnih škola* od 6. maja 1883. godine. U ovom uputstvu prvi put se govori o tome da nadzornik treba da prati da li je učitelj rezultate postigao oslanjajući se na savremena saznanja iz pedagogije i drugih nauka, razvijajući samoradnju i mišljenje učenika ili se u metodama rada previše oslanjao na „mehanicizam i upamćivanje gradiva”.¹⁹ Uputstva za školske nadzornike koja su donošena u narednom periodu zadržala su ovaj stručno-pedagoški zahtev. Statistički pregled za period 1880–1884. godine pokazuje da se broj nadzornika kretao između 24 i 28 i da su nadzornici u reviziji u proseku provodili od 25 do 33 dana, da je svaki nadzornik u proseku imao da pregleda oko 27 škola i oceni oko 38 učitelja.²⁰ U ovakvim uslovima bilo je teško da nadzornik stekne objektivan uvid u način rada učitelja i da se pozabavi stručnim upućivanjem učitelja u bolje metode nastavnog rada.

Iako su učitelji isticali zahtev da se školski nadzornici biraju iz učiteljskih redova u periodu 1883–1886. godine broj učitelja školskih nadzornika kretao se od jedan do četiri po školskoj godini. Učitelji su znali da je u pozadini ovakvog stanja stajala politička volja. Kao simpatizeri i podržavaoci radikalne stranke u obračunu kralja Milana sa radikalima, koji je usledio nakon Timočke bune, učitelji su bili u nemilosti, a zbog svojih političkih stavova premeštani su iz mesta u mesto, pa čak i otpušteni iz službe. O karakteru školske revizije u ovom periodu govore dva priloga Jovana Miodragovića, prvi iz 1883. i drugi iz 1887. godine. U prvom je dao sliku godišnjih ispita u Lajpcigu, u koji je kao državni blagodejanac poslat na studije pedagogije, a u drugom je opisao lično iskustvo iz uloge školskog nadzornika u Srbiji. O školskoj reviziji u Lajpcigu J. Miodragović piše sledeće: ispiti se odvijaju u velikim salama i imaju karakter svečanosti, „/.../ čistoća najveća svuda! /.../ Učenici ne drhću /.../ Milina vam je prosto gledati onu mirnoću, smišljenost i slobodu s kojom deca sede, slušaju pitanja i odgovaraju na njih”.²¹ Učitelji sede u začelju sale, to je prilika da uče jedni od drugih, a ne da se uzajamno kontrolišu, nadzornik ne ispituje jednog po jednog učenika, već postavlja pitanje svima, a učenici se slobodno javljaju i ako neko pogreši drugi ga ispravljaju. Slika školske revizije u Srbiji bila je potpuno drugačija. Kao nadzornik za škole u mlavskom i moravskom srezu za školsku 1886/87. godinu, J. Miodragović piše o svom nadzorničkom iskustvu sledeće: naglašava da je obilazio škole koje se nalaze u selima kojih najčešće nema na geografskim kartama i da se

¹⁸ „Zakon o osnovnim školama”, *Prosvetni glasnik*, 1883, god. IV, sv. 4, str. 41–51.

¹⁹ „Uputstvo za nadzornike osnovnih škola”, *Prosvetni glasnik*, 1883, god. IV, sv. 9, str. 337–342.

²⁰ Jovanović, B. (1889). „Statistika nastave u Kraljevini Srbiji od 1880–81. do 1883–84. školske godine”. *Prosvetni glasnik*, god. X, sv. 9. i 10, str. 288.

²¹ Miodragović, J. (1883). „S nemačkog ispita”. *Učitelj*, god. II, br. 14, str. 209.

o tome kako da do njih dođe obaveštavao od ljudi koji su o tome imali bilo kakav podatak; da je jedan broj škola obišao u pratnji lokalnog sveštenika sa kojim je putovao na konju jer putevi nisu bili raskršteni; o školama koje je posetio piše da su blatnjave, da su deca neuredna i da je higijena na niskom nivou, da su učionice zagušljive i da se ne provetravaju, da su učenici više zaokupljeni zapamćivanjem nego razmišljanjem, da učitelji najčešće drže predavanja, a i kada postave neko pitanje da sami na njega odgovaraju.²²

Učitelji su bili nezadovoljni školskim nadzorom, delom zbog činjenice da je njihov izbor za školske nadzornike stalno bio pod znakom pitanja, delom zbog karaktera nadzora i ponašanja nadzornika koji su sebe videli kao inspektore i kontrolore. Takođe, zakon je predviđao da se platni razredi učitelja određuju prema godinama službe i ocenama koje su dobijali od nadzornika i ovo je bila tačka zbog koje je bilo teško uspostaviti odnos poverenja. Dodajmo i to da je broj nadzornika bio mali i da su nadzornici u jednoj školi boravili samo po nekoliko časova i ispitivali svakog učenika tek po nekoliko minuta. Ovakva organizacija nadzora imala je za posledicu da ministarstvo zapravo i nije moglo da dobije pravi uvid u stanje škola i rad učitelja, ali je imalo pravo da na osnovu, rekli bismo, subjektivne i za kratko vreme pribavljene procene nadzornika, unapređuje, premešta, kažnjava i otpušta učitelje. Opisujući ulogu školskog nadzora u osnovnim školama, a na temelju analize izveštaja školskih nadzornika u prvoj polovini osamdesetih godina XIX veka V. Karić piše: „Iz tih izveštaja, a naročito iz uputstava koja se daju nadzornicima osnovnih škola posmatralac dobija utisak kao da je u svom poslu oko škole i u samoj školi, učitelj glavni a škola samo sporedno sredstvo; učitelj koliko radi da radi u školi, on radi samo za ispit, za nagradu, a posle ispita kako bude.”²³

U javnosti se osamdesetih godina XIX veka vodila intenzivna polemika o školskom nadzoru. Predlozi uređenja školske revizije bili su različiti: jedni su tražili ukidanje svakog nadzora, drugi su se zalagali za uvođenje stalnog stručnog nadzora koji bi obavljali činovnici zaposleni pri Ministarstvu prosvete i crkvenih dela, treći da se ništa ne menja u konceptu nadzora, već da se on samo bolje organizuje i uredi. Koncept stalnog stručnog nadzora, koji je već bio usvojen u Nemačkoj, Francuskoj i Austriji, kod nas je zagovarao dr V. Bakić. Međutim, učitelji su imali loše iskustvo i pokazivali su snažan otpor prema reviziji, a naročito prema stalnom nadzoru koji bi se vršio tokom cele školske godine. Na učiteljskoj skupštini, koja je održana u Beogradu avgusta 1887. godine, Jovan D. Jovanović podneo je referat u kome je kao argumente protiv stalnog stručnog nadzora naveo da bi stalni nadzornici bili finansirani iz ionako malog prosvetnog budžeta i

²² Miodragović, J. (1887). „Nadzor”, *Učitelj*, god. VI, sv. 24, str. 374–376; sv. 25, str. 389–391; sv. 26, str. 410–412, sv. 27, str. 422–424; sv. 28, str. 458–461.

²³ Karić, V. (1886). *Školovanje u Srbiji i njegovi rezultati*, Beograd, str. 22–23.

da je bolje da se ta sredstva utroše na školovanje učitelja i da bi stalni nadzornici bili više agenti vladajuće stranke, nego prosvete, te da bi se više bavili političkim ubedenjima učitelja, a manje njihovim školskim radom.²⁴

Postalo je izvesno da je potrebno menjati karakter školskog nadzora koji je isključivo imao funkciju ocenjivanja učitelja i koji se razvio u instrument kontrole nad učiteljima, ali ne kontrole njihovog pedagoškog rada, već kontrole političkih stavova i odnosa prema vlastima. Dešavalo se i da nadzornik oceni učitelja lošom ocenom na nagovor seoskog kmeta kome iz kakvog ličnog razloga nije odgovarao, ili zbog privatnog sukoba učitelja sa upraviteljem škole. Na koji način su se učitelji nosili sa ovim problemima? Malobrojni i još uvek bez pravog osećanja profesionalnog zajedništva učitelji su se dovijali od prilike do prilike: da bi pripremili učenike za godišnji ispit držali su privatne časove učenicima iz bogatijih porodica, pri kraju školske godine opterećivali su učenike učenjem za ispit zadavajući im „za svaki dan po dve tri stane da nauče napamet”, dozvoljavali su da se slabiji učenici ispisuju iz škole.²⁵

Redakcija „Učitelja” ustalila je praksu objavljivanja članaka u kojima su analizirani izveštaji školskih nadzornika koji su izlazili u „Prosvetnom glasniku”. U kritici je prednjačio beogradski učitelj Đorđe Kojić. Njegova analiza izveštaja nadzornika za školsku 1887/88. godinu pokazala je da nadzornički izveštaji imaju karakter opisa stanja u školama i da u njima nema predloga kako da se stanje popravi. Na primer, nadzornici su kritikovali učitelje da drže časove gimnastike samo uoči godišnjeg ispita, ali nisu beležili da su uslovi u učionicama toliko loši da je mnogo bolje da se gimnastika i ne radi u prašini i zagušljivom vazduhu; nadzornici su često konstatovali da mnogi učenici nisu naučili da pišu, ali nisu beležili podatak da učitelji rade u nepodeljenim odeljenjima sa oko šezdeset učenika u jednoj učionici; ili, nadzornici su kritikovali učitelje da ne pomažu razvoj narodne privrede ali nisu pisali o tome da zbog čestih premeštaja učitelji nisu bili motivisani da se ozbiljnije angažuju oko školske gradine. Đ. Kojić piše: „/.../ učitelju je dato po četiri razreda i šezdeset đaka i ovaliki program, premeštaju nas svake godine, a po negde i po više puta u godini, pa opet oće da budemo pletlari, svilari, voćari i gradinari, a da čovek ovo radi treba unapred da zna da je to njegovo /.../.”²⁶

Na listi nadzornika za školsku 1887/88. i 1888/89. godinu nije bilo učitelja²⁷, ali već školske 1889/90. godine odlukom radikalnog ministra prosvete i cr-

²⁴ Jovanović, D. J. (1887). „Nadzor”, *Učitelj*, god. VI, sv. 22, str. 357–363.

²⁵ Ištanić (1888), „Najbolji učitelji u Srbiji”, *Učitelj*, god. VII, br. 7, str. 108–109.

²⁶ Kojić, Đ. (1888). „Kratka pregled izveštaja sviju nadzornika osn. škola za 1887/88. školsku godinu”. *Učitelj*, god. VII, br. 33, str. 528.

²⁷ „Školski nadzornici za 1887–88. školsku godinu”, *Prosvetni glasnik*, 1888, god. IX, sv. 5–6, str. 353–354; „Školski nadzornici za 1888–89. školsku godinu”, *Prosvetni glasnik*, 1889, god. X, sv. 9–10, str. 268–269.

krvenih dela, A. Nikolića, postavljen je 51 nadzornik među kojima je bilo 9 učitelja, a školske 1890/91. godine on je postavio 59 nadzornika, od kojih 9 učitelja.²⁸

Zainteresovani da se školski nadzor uredi na drugačiji način učitelji se preko svog udruženja organizovano uključuju u raspravu o karakteru školskog nadzora. Tako je Glavni odbor Učiteljskog udruženja u 1889. godini sastavio predlog nove koncepcije školskog nadzora.²⁹ Odbor je kritikovao dotadašnju praksu nadziranja, procenjujući da je revizija uglavnom negativno uticala na autoritet učitelja i kod dece i kod građana, da se pokazalo da ocenu dobar (ocena 3) nadzornici smatraju za nisku, da nadzornici nisu stručni i da uglavnom ne poznaju školu. Učiteljsko udruženje je predložilo da se za nadzornike postavljaju lica koja imaju pedagoško obrazovanje i iskustvo u školskom radu i nastavi, odnosno da se za nadzornike biraju lica koja imaju završenu učiteljsku školu sa najmanje vrlo dobrim uspehom, sa najmanje osam godina učiteljskog iskustva i ocenom najmanje vrlo dobar za rad i sa položenim nadzorničkim ispitom iz pedagoške grupe predmeta i stranog jezika. U vezi sa dužnošću nadzornika predloženo je sledeće: zadatak nadzornika bio bi da obilazi škole na početku školske godine, da naređuje nabavku stvari koje su potrebne i rešavanje problema koji su aktuelni, da savetuje učitelje u radu i kasnije prema zatečenom stanju ocenjuje njihov rad, da u toku godine najmanje tri puta obilazi škole, da najmanje tri puta godišnje okuplja učitelje na sastanke na kojima bi se raspravljala školska pitanja, izriče opomene nesavesnim učiteljima, prisustvuje godišnjem ispitu i prevodi učenike u starije razrede u dogovoru sa učiteljem, da izveštava ministarstvo o učiteljima koji ne rade po zakonu, te da se oni kazne, da se stara o podizanju novih školskih zgrada, da daje kraća odsustva učiteljima i vodi prepisku između škole i ministarstva.

Godine 1890. dr V. Bakić napisao je novi predlog zakona o uređenju školskog nadzora kojim je tražio uvođenje *stručnog nadzora* – koji bi obavljali „praktični pedagozi i naučno obrazovani nastavnici” i *stalnog nadzora* – čime bi se obezbedilo da nadzornik upozna sve škole i učitelje i da im pruži pomoć u radu. Međutim, ovaj nacrt zakona o uređenju školskog nadzora nije primljen.³⁰

Ako pratimo uputstva za školske nadzornike koji su doneti u periodu 1879–1890. godine vidimo da se njihov karakter postepeno menjao, ali i da su ministri prosvete i crkvenih dela na različite načine definisali ulogu školskog nadzora. Takođe, možemo da zaključimo da se, iako je nadzor sve vreme imao naglašeno kontrolnu funkciju, postepeno razvija ideja o instruktivnom karakteru

²⁸ „Školski nadzornici za 1889–90 školsku godinu”, *Prosvetni glasnik*, 1890, god. XI, sv. 9–12, str. 234–235; „Nadzornici osnovne škole za 1890–91. god.”, *Prosvetni glasnik*, 1891, god. XII, sv. 6, str. 282–284.

²⁹ „Predlozi VI učiteljskoj skupštini”, *Učitelj*, 1889, god. VIII, sveska za juni, str. 391–395.

³⁰ „Sastanak 626, 627. i 628. (13, 22. i 27. mart 1896. god.)”, *Prosvetni glasnik*, 1895, god. XVI, sv. 6, str. 283–288.

školskog nadzora. U uputstvima za nadzornike pojavljuju se pedagoški zahtevi – insistira se na tome da nadzornik treba da prati ne samo ukupan rezultat u nastavi, već i način na koji je do njega učitelj došao. Takođe, nadzornici su dobili još jednu važnu ulogu – da pribiraju statističke podatke o brojnom stanju škola, učitelja i učenika, čime se postepeno uobličavala statistika javne nastave. Problem izbora školskih nadzornika, međutim, u ovom periodu nije bio rešen – nadzornici su uglavnom postavljeni iz redova profesora gimnazija (visoka stručna sprema je bila osnovni uslov izbora nadzornika), „fakultetlije”, kako su ih nazivali učitelji, često nisu bile zainteresovane, a ni stručno osposobljene da preuzmu ulogu savetnika i pomognu učiteljima da unaprede kvalitet nastavnog rada.

Promene u koncepciji školskog nadzora u periodu od 1890. do 1898. godine

U narednom periodu, sve do donošenja *Zakona o narodnim školama* od 26. jula 1898. godine, karakter školskog nadzora nije se bitnije menjao, osim što su ministri prosvete u uputstvima akcentovali različite zadatke školske revizije: dok su jedni insistirali na sakupljanju podataka o brojnom stanju škola, učenika i učitelja, drugi su u prvi plan stavljali godišnje ispite učenika i ocenjivanje učitelja. Otpor učitelja prema nadzoru i nadzornicima bio je stalno prisutan. Zbog neregularnih uslova rada koji su nastali u godini izbora za Skupštinu (školska 1892/93. godina), kada su učitelji masovno otpušteni i premeštani zbog političkog angažovanja, doneta je odluka da se ne realizuje revizija i da godišnje ispite i prevođenje učenika u više razrede izvrše sami učitelji.³¹

U školskoj 1893/94, 1894/95. i 1895/96. godini nijedan učitelj nije postavljen za nadzornika (broj nadzornika kretao se između 50 i 70).³² Odluku da se učitelji ne kandiduju za nadzornike J. Miodragović je u ime Glavnog prosvetnog saveta obrazlagao činjenicom da bi izbor učitelja za nadzornike stvorio organizacione poteškoće – škole bi u poslednjem mesecu školske godine morale da nađu zamenju učitelju koji zbog revizije ne bi mogao da drži nastavu, procenom da učitelji nisu dovoljno kompetentni – često drže nastavu samo u određenim razredima i nemaju dovoljno iskustva u radu u svim razredima osnovne škole i stavom da je „neumesno da ravan ravnog ocenjuje”.³³ Zbog odluke Glavnog prosvetnog saveta

³¹ „Ispiti u osnovnim školama ove godine“, *Učitelj*, 1893, god. XII, br. 10, str. 874.

³² „Sastanak 591. (27. april)“, *Prosvetni glasnik*, 1894, god. XV, sv. 7. i 8, str. 332–334; „Školski nadzor u 1894–95. godini“, *Prosvetni glasnik*, 1895, god. XVI, sv. 6, str. 316–317; „Školski nadzor u 1895–96. šk. god.“, *Prosvetni glasnik*, 1896, god. XVII, sv. 6, str. 269–272.

³³ Miodragović, J. (1896). „O kandidaciji učitelja za nadzornike“, *Učitelj*, god. XV, br. 19–20, str. 998–1005.

da se učitelji ne postavljaju za nadzornike učitelji S. Maksimović i M. Stojanović dali su ostavku na članstvo u Glavnom prosvetnom savetu.³⁴ Pod pritiskom učitelja i ministra prosvete i crkvenih dela u naredne dve školske godine Glavni prosvetni savet predložio je liste školskih nadzornika na kojima je bilo učitelja, od kojih je u 1896/97. postavljeno pet, a u školskoj 1897/98. godini njih deset.³⁵

Neodlučnost prosvetne vlasti da uvede stalni stručni nadzor imala je korene u nepoverenju prema nadzoru kao instrumentu unapređivanja kvaliteta rada škola i učitelja, u podozrivosti prema ustanovljavanju nove prosvetne institucije koju je, procenjivalo se, trebalo dodatno držati pod kontrolom i u proceni da je novac iz prosvetnog budžeta bolje upotrebiti na podizanje školskih zgrada i plate učitelja, a delom je bila posledica činjenice da su svaku promenu školskog nadzora učitelji primali sa rezervom i da je nadzor bila tema oko koje su Ministarstvo prosvete, Glavni prosvetni savet i učitelji imali često sasvim različita gledišta. Nakon isprobavanja različitih modela revizije, krajem XIX veka, ušlo se u korenitu reformu u ovoj oblasti, srpska prosveta dobila je stalni stručni školski nadzor, po ugledu na nadzor koji je već bio razvijen u evropskim zemljama.

Uvođenje stalnog stručnog nadzora nad osnovnim školama

Rad na reformi školskog nadzora u Kraljevini Srbiji nastavljen je u 1898. godini. Učiteljsko udruženje i Glavni prosvetni savet sastavili su svoje predloge zakona o uređenju školskog nadzora, predloge kojima se u suštini tražilo uvođenje stalnog stručnog nadzora.³⁶

Stalni stručni nadzor u osnovnim školama uveden je *Zakonom o narodnim školama* od 26. jula 1898. godine.³⁷ Ovim zakonom predviđeno je da nadzor vrše glavni nadzornik (referent za osnovnu nastavu u Ministarstvu prosvete i crkvenih dela) i okružni školski nadzornici. Sprema nadzornika definisana je na sledeći način: za nadzornike su mogli biti postavljeni profesori učiteljskih i srednjih škola koji su položili profesorski ispit iz pedagoško-filozofske grupe nauka i imaju najmanje deset godina nastavničkog staža, a u oskudici ovih kandidata za nadzornike mogu biti birani i učitelji sa najmanje 15 godina radnog iskustva i odličnom ocenom za rad. Pored dužnosti da prikupljaju statističke i druge podatke o ško-

³⁴ „Protiv učitelja“, *Učitelj*, 1896, god. XV, br. 16, str. 826.

³⁵ „Nadzornici za školsku 1896/97. god.“, *Prosvetni glasnik*, 1897, god. XVIII, sv. 6. str. 318–319; „Školski nadzor u 1897–98. šk. god.“, *Prosvetni glasnik*, 1898, god. XIX, sv. 6. str. 289–291.

³⁶ Pruska je uvela stalni školski nadzor još 1872. godine („Napomene o platama učiteljskim i nadzoru osnovnih škola u nekim evropskim zemljama“, *Prosvetni glasnik*, 1898, god. XIX, sv. 5. str. 249).

³⁷ „Zakon o narodnim školama“, *Prosvetni glasnik*, 1898, god. XIX, sv. 9. str. 442–453.

lama, učiteljima i učenicima, okružni nadzornici dobili su zadatak da najmanje tri puta godišnje obilaze škole u svom okrugu (poslednji pregled škola vrši se krajem školske godine kada se ocenjuju učitelji i učenici prevode u više razrede), da postavljaju školske upravitelje i nadgledaju njihov rad, kao i rad školskih odbora, da se staraju o otvaranju novih škola i razreda, rešavaju sporove između učitelja, upravitelja i školskog odbora, isleđuju manje krivice učitelja, odlučuju o upisivanju i ispisivanju učenika, sazivaju mesna, sreska i okružna veća učitelja i upravitelja, brinu o popunjavanju upražnjenih učiteljskih mesta, vode prepisku između učitelja i Ministarstva prosvete, podnose tromesečne izveštaje o školama u okrugu i daju predloge šta treba da se uradi.

Prvi stalni školski nadzornici postavljeni su 11. septembra 1898. godine, bilo ih je 17 i većinom su bili izabrani iz redova profesora gimnazija i učiteljske škole.³⁸ O novom konceptu školskog nadzora učitelji su raspravljali na skupštini Učiteljskog udruženja koja je održana avgusta 1899. godine u Kragujevcu. U uvodnom referatu J. Maksimović izneo je očekivanja učitelja.³⁹ Zbog iskustva sa školskom revizijom iz prethodnog perioda, učitelji su bili posebno osetljivi na narušavanje njihove autonomije i J. Maksimović je u referatu akcentirao stavio na odnos nadzornika prema učiteljima – od nadzornika traži da u prvom redu vode računa o ugledu učitelja, da održavaju jedinstvo i harmoniju u odnosima, da imaju razvijenu svest o tome da učitelji imaju svoja prava i da im nisu potčinjeni, da poštuju slobodu učiteljeve misli koja je uslov i naučnog i školskog rada.

Uputstvo nadzornicima za školsku 1899/1900. godinu, doneto 24. decembra 1899. godine, veoma je opširno.⁴⁰ Njime je definisano da nadzornik vrši administrativni nadzor u cilju otklanjanja problema u radu škole i instruktivni nadzor u cilju unapređivanja rada učitelja. U devetnaest tačaka detaljno su razrađeni zadaci nadzornika. Da bi se obezbedio kontinuitet u nadzoru određeno je da nadzornik obilazi škole tri puta godišnje, iznenada i bez najave. Na početku godine nadzornik treba da se upozna sa školama – da sagleda u kakvom su stanju školske zgrade, učionice, školski nameštaj, nastavna sredstva, školska dvorišta, školske knjižnice, školske kase, plate i smeštaj učitelja. Drugi pregled škole nadzornik treba da vrši sredinom godine, kada proverava da li su rešeni problemi konstatovani u prvom pregledu. Treći pregled odnosi se na godišnje ispite učenika i ocenjivanje rada učitelja. Posebnim poglavljem, „Ponašanje nadzornikovo“, nadzornici se upućuju na koji način da se ophode prema učiteljima. Između ostalog je naglašeno: „Nadzornik nikada ne sme smetnuti s uma da je služba

³⁸ „Ukazi njegovog veličanstva kralja“, *Prosvetni glasnik*, 1898, god. XIX, sv. 11. str. 490.

³⁹ Maksimović, J. (1899). „Kakav treba da je školski nadzornik prema školi i prema učitelju“. *Učitelj*, god. XIX, br. 2, str. 98–100.

⁴⁰ „Uputstvo nadzornicima osnovnih škola“, *Prosvetni glasnik*, 1900, god. XXI, sv. 1. str. 14–31.

učiteljska mučna i zamorna i da je njemu zadatak da je učiteljima olakša savetom, uputom i nabavkom svih potreba na vreme. Stoga će on njih više poučavati i upućivati nego prekoračiti i kažnjavati i samo onda ako pouke i uputi ne pomognu, pribegavaće kaznama kao krajnjim sredstvom”.⁴¹

Kada je 1898. godine uveden stalan stručni nadzor za nadzornika za Beograd postavljen je dr Stevan Okanović. Iz njegovog izveštaja o narodnim školama u Beogradu u školskoj 1900/1901. godini saznajemo da je u pogledu instruktivnog, stručnog nadzora, preduzeo sledeće: sa učiteljima je nakon posmatranja nastavnih časova organizovao veća na kojima je raspravljao o nastavnim pitanjima, u nekolicini škola angažovao je sposobnije učitelje da drže pedagoška predavanja, osnovao je učiteljski hor, preporučivao učiteljima koju stručnu literaturu da čitaju, a planirao je i da organizuje obuku učitelja u stranim jezicima da bi mogli da koriste pedagošku literaturu.⁴² Sličnu praksu uveli su i drugi okružni školski nadzornici.

Da bi u praksi zaživela koncepcija stalnog stručnog nadzora koja je uvedena zakonom iz 1898. godine, bilo je neophodno da se obezbedi dovoljan broj stručnih nadzornika. Na inicijativu profesora Velike škole, dr V. Bakića, 1900. godine ustanovljena je na Velikoj školi 11. filozofsko-pedagoška grupa koja je, između ostalog, trebalo da sprema školske nadzornike i na koju su od 1901. godine učitelji primani za redovne slušaoce.⁴³ Ali, novom reformom školskog nadzora koja je započela donošenjem *Zakona o narodnim školama* od 19. aprila 1904. godine, izmenjeni su zahtevi u vezi sa stručnom spremom nadzornika. Naime, određeno je da se za nadzornike mogu postavljati profesori gimnazija i učiteljskih škola sa položenim ispitom zrelosti, završenim Filozofskim fakultetom i položenim profesorskim ispitom iz pedagoške grupe predmeta. Novim zakonom tražilo se da nadzornik ima položen ispit zrelosti, a učitelji koji su u međuvremenu upisali studije pedagogije na Velikoj školi nisu imali položen ovaj ispit. Time je ponovo otvoreno pitanje izbora školskih nadzornika iz učiteljskih redova.

Zaključak

U periodu 1898–1904. godine, u Srbiji je zaveden stalan stručni nadzor osnovnih škola. Za razliku od školske revizije koja je uvedena tridesetih godina

⁴¹ Isto, str. 29.

⁴² Okanović, S. (1901). „Izveštaj o narodnim školama za grad Beograd“, *Prosvetni glasnik*, god. XXII, sv. 2. str. 173–188; sv. 7, str. 813–830.

⁴³ Tešić, V. (1967). „Pedagogija na Liceju, Velikoj školi i na Univerzitetu u Beogradu do 1914. godine“. U N. Potkonjak i dr. (ur. ed.) *Sedamdeset pet godina Katedre za pedagogiju*, Beograd: Filozofski fakultet, str. 7–39.

XIX veka i imala funkciju upravnog nadzora, stalan stručni nadzor imao je u većem stepenu instruktivni karakter i bio je u funkciji unapređivanja rada učitelja.

Da bi se promenila tradicija školskog nadzora, koja se formirala kroz čitav XIX vek, nije bilo dovoljno da se donese zakon o stalnom stručnom nadzoru. Bili su potrebni školovani nadzornici. S druge strane, stalni školski nadzor nije bio dovoljan da se reše brojni problemi osnovne škole. Neredovnost učiteljskih plata, nedovoljno izdvajanje iz opštinskog budžeta za školske zgrade i opremu škole, nedostatak udžbenika, veliki broj učenika u odeljenjima, neredovnost pohađanja nastave, svi ovi problemi čekali su nadzornika kao eksponenta državne vlasti, mada on nije mogao da ih reši.

Debata o karakteru nadzora nad osnovnim školama nije dovela do željenih rezultata, ali je ukazala na razvoj profesionalne svesti učitelja u Srbiji i njihovu potrebu da se naučno i društveno afirmišu.

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- ČASOPIS ŠKOLA.
- ČASOPIS PROSVETNI GLASNIK.
- ČASOPIS UČITELJ.

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Development of the Institution of Continuous Supervision of Primary Schools in Serbia at XIX Century⁴⁵

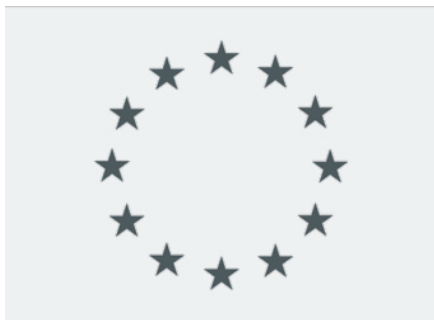
Abstract: In this paper we presented the development of the institution of school supervision in Serbia in the 19th century. Based on the analysis of the normative framework of school supervision (school law, instructions and regulations), reports of school inspectors and teachers' notes on the character of the school supervision, we tried to illuminate and explain changes in the concept of supervision over primary school. Our analysis has shown that school supervision in Serbia started as an administrative inspection which had a function of control of schools and teachers, and that in nineties of the 19th century, prevailed concept of continuous professional supervision with the dominant instructive function – to improve the quality of the teaching and teachers' qualifications. Changes in the concept of school supervision is reflected in the different names of the institution: first, the monitoring was carried out by directors and inspector, then by the guardians and at the end of the century schools' supervisors.

Key words: history of education, school supervision, primary school.

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⁴⁵This paper is a part of research project undergoing realization at The Institute of Pedagogy and Andragogy, Faculty of Philosophy in Belgrade, „Models of assessment and strategies for improvement of quality of education” (179060), supported by Ministry of science and technology RS.

DOKUMENTI



SAVET EVROPE

Obrazovanje i obuka 2020.

Zaključci Saveta o strateškom okviru za evropsku saradnju
u oblasti obrazovanja i obuke
(„ET 2020“)

Brisel, 12.5.2009.

Savet je doneo sledeće zaključke:

SAVET EVROPSKE UNIJE PONOVO SE VRAĆA NA

odobrenje iz marta 2002. godine kada je u Barseloni Evropski savet za radni program „Obrazovanje i obuka 2010.“ koji je u kontekstu Lisabonske strategije po prvi put uspostavio stabilan okvir za evropsku saradnju na polju obrazovanja i obuka a koji se zasniva na zajedničkim ciljevima i primarno je usmeren na unapređenje nacionalnog sistema obrazovanja i obuka putem razvoja komplementarnih alatki na nivou Evropske unije, zajedničkog učenja i razmene dobre prakse putem otvorenog metoda koordinacije;

PREPOZNAJE

da su saradnja u gorepomenutom radnom programu, uključujući i procese iz Kopenhagena i inicijative u okviru Bolonjskog procesa dovele do značajnog napretka, najviše u podršci nacionalnim reformama celoživotnog učenja, modernizaciji visokog obrazovanja i razvoju zajedničkih evropskih instrumenata za promociju kvaliteta, transparentnosti i mobilnosti. Međutim, značajni izazovi i dalje postoje ukoliko Evropa želi da dostigne svoju ambiciju i postane najkonkurentnija i najdinamičnija ekonomija sveta zasnovana na znanju;

NAGLAŠAVA da:

1. obrazovanje i obuka imaju ključnu ulogu u prevazilaženju mnogih socio-ekonomskih, demografskih, ekoloških i tehnoloških izazova sa kojima se suočava Evropa i njeni građani danas i sa kojima će se suočavati u godinama koje dolaze.
2. su efikasne investicije u ljudski kapital putem sistema obrazovanja i obuke ključni deo evropske strategije za održanje visokog nivoa održivog rasta zasnovanog na znanju i poslova koji se nalaze u srži Lisabonske strategije a koji u isto vreme promovišu lično ispunjenje, socijalnu koheziju i aktivno građanstvo.

PREPOZNAJE da:

1. unapređen strateški okvir za evropsku saradnju u oblasti obrazovanja i obuke koji se nadovezuje na napredak postignut u radnom programu „Obrazovanje i obuka 2010.“ može još više povećati efikasnost ove saradnje i obezbediti kontinuiranu dobit i podršku za sistem obrazo-

vanja i obuke u državama članicama do 2020. godine, imajući u vidu različitost koja se javlja u Evropi i jedinstvene mogućnosti koje ono donosi uz puno poštovanje odgovornosti država članica za svoj sistem obrazovanja.

2. su obrazovanje i obuka napravili značajan doprinos ka postizanju dugoročnih ciljeva Lisabonske strategije za rast i razvoj poslova. U očekivanju budućeg razvoja ovog procesa, naponi moraju biti usmereni na to da obrazovanje i obuka budu čvrsto utemeljeni u široj strategiji. Neophodno je takođe da okvir evropske saradnje bude fleksibilan kako bi odgovorio na trenutne i buduće izazove, uključujući i one koji mogu da se pojave u nekoj novoj strategiji posle 2020. godine.

SA POSEBNIM INTERESOVANJEM BELEŽI

komunikaciju između Komisije i Evropskog parlamenta, Saveta i Komisije za ekonomski i društveni razvoj kao i Komisije regiona o unapređenom strateškom okviru za evropsku saradnju u oblasti obrazovanja i obuke.

SLAŽE SE da:

1. U periodu do 2020. godine primarni cilj evropske saradnje treba da bude podrška daljem razvoju sistema obrazovanja i obuke u državama članicama koji treba da osigura:
 - a. lično, društveno i profesionalno ispunjenje svih građana
 - b. održivi ekonomski prosperitet i zapošljivost pri tome promovišći demokratske vrednosti, društvenu koheziju, aktivno građanstvo i inerkulturalni dijalog.
2. Ove ciljeve treba prosmatrati iz svetske perspektive. Države članice prepoznaju značaj otvorenosti prema celom svetu kao preduslov za globalni razvoj i prosperitet koji će, putem pružanja odličnog i atraktivnog obrazovanja, obuke i mogućnosti za istraživački rad pomoći Evropskoj uniji da dostigne zadate ciljeve i postane vodeća ekonomija na svetu zasnovana na znanju.
3. Evropska saradnja u oblasti obrazovanja i obuke za period do 2020. godine treba da bude uspostavljena u kontekstu strateškog okvira koji obuhvata sistem obrazovanja i obuke kao celine u perspektivi celoživotnog učenja. Zaista, celoživotno učenje treba posmatrati kao osnovni princip koji je temelj čitavog okvira i osmišljen da pokrije učenje

u svakom kontekstu – formalnom, neformalnom i informalnom i na svim nivoima: od ranog obrazovanja i školovanja do visokog obrazovanja, stručnog obrazovanja i obuke i obrazovanja odraslih.

Okvir posebno treba da odgovori na sledeća četiri strateška cilja (koja su detaljnije objašnjena u tekstu ispod):

- Rad na tome da celoživotno učenje i mobilnost postanu realnost,
 - unapređenje kvaliteta i efikasnosti obrazovanja i obuke,
 - promocija jednakosti, društvene kohezije i aktivnog građanstva,
 - unapređenje kreativnosti i inovacije, uključujući i preduzetništvo, na svim nivoima obrazovanja i obuke.
4. periodično praćenje napretka u odnosu na postavljeni cilj kao ključni doprinos kreiranju politike zasnovane na dokazima. Za strateške ciljeve koji su gorenavedeni u periodu od 2010. do 2020. godine treba razviti indikatore i preporuke za Prosečno evropsko dostignuće („Evropske referentne tačke“), koji su pomenuti u Dodatku I ovog dokumenta.

Strateški cilj 1: Učiniti da celoživotno učenje i mobilnost postanu stvarnost

Izazovi koji su posledica demografskih promena i stalna potreba da se unapređuju i razvijaju veštine u skladu sa promenama ekonomskih i društvenih okolnosti zahtevaju pristup celoživotnom učenju i sistemu obrazovanja i obuke koji je osetljiviji na promene i otvoreniji za širu zajednicu. Iako su nove inicijative u oblasti celoživotnog učenja razvijane tako da odgovaraju na izazove budućnosti, dalji napredak tekućih inicijativa još uvek je neophodan, posebno kada je u pitanju implementacija usklađenih i sveobuhvatnih strategija celoživotnog učenja. Posebno je važno osigurati razvoj nacionalnih okvira kvalifikacija koji se zasnivaju na realnim ishodima učenja i njihova povezanost sa Evropskim okvirom kvalifikacija, kao i uspostavljanje fleksibilnijih putanja za učenje, uključujući i bolju tranziciju između različitih sektora u obrazovanju i obuci, veću otvorenost za neformalno i informalno učenje i bolju transparentnost i prepoznavanje ishoda učenja. Neophodni su dalji napor kako bi se promovisalo učenje odraslih, unapredio kvalitet sistema vođenja i privlačnost učenja uopšte, uključujući razvoj novih formi učenja i korišćenje novih tehnika nastave i tehnologija za učenje.

Ključni element celoživotnog učenja i važno sredstvo za povećanje zaposljivosti ljudi i njihove adaptivnosti – mobilnost za učenike, nastavnike i one koji

obučavaju nastavnike treba postepeno unapređivati, imajući u vidu da učenje u inostranstvu, u Evropi i svetu treba pre da bude pravilo nego izuzetak. U ovom procesu treba primeniti principe koji su navedeni u Evropskoj povelji kvaliteta za mobilnost. Dostizanje ovih ciljeva zahteva obnavljanje napora svih koji su u proces uključeni, na primer radi obezbeđivanja adekvatnih fondova.

Strateški cilj 2: Unapređenje kvaliteta i efikasnosti obrazovanja i obuke

Visok nivo sistema obrazovanja i obuke koji su i efikasni i nepristrasni ključni su za uspeh Evrope i povećanje zapošljivosti. Najveći izazov jeste osigurati mogućnost da svako može da stekne kompetencije i razvijanje privlačnosti i izvrsnosti na svim nivoima u obrazovanju koji će Evropi dozvoliti da zadrži važnu globalnu ulogu koju ima. Da bi postigli održivost ovih akcija neophodno je više usmeriti pažnju na podizanje nivoa bazičnih veština kao što su pismenost i operacije sa brojevima, učiniti matematiku, nauku i tehnologiju privlačnijim i poboljšati lingvističke kompetencije. U isto vreme neophodno je osigurati kvalitet nastave, obezbediti adekvatno obrazovanje nastavnika, kontinuirano profesionalno usavršavanje nastavnika i trenera i povećati privlačnost profesije nastavnika. Neophodno je unaprediti upravljanje i liderstvo u institucijama za obrazovanje i obuku i razviti sisteme za osiguranje kvaliteta. Visok kvalitet može se postići samo kroz razvoj efikasnog i održivog korišćenja privatnih i javnih resursa i putem promocije politike zasnovane na dokazima i prakse u obrazovanju i obuci.

Strateški cilj 3: Promocija jednakosti, društvene kohezije i aktivnog građanstva

Politika u obrazovanju i obuci treba da pruži mogućnost svim građanima da bez obzira na njihove lične, ekonomske i društvene okolnosti steknu, unaprede ili razviju u toku svog životnog veka veštine specifične za njihov posao i ključne kompetencije koje su neophodne za njihovu zapošljivost kako bi negovali nastavak učenja, aktivno građanstvo i interkulturalni dijalog. Obrazovni nedostaci moraju se nadomestiti preko obezbeđivanja predškolskog obrazovanja i podrške za specifične grupe i promociju inkluzivnog obrazovanja. Sistemi obrazovanja i obuke teže da pruže mogućnost svim učenicima, uključujući i one iz osetljivih grupa, učenike sa posebnim potrebama i imigrante, da završe školu, uključujući, gde je neophodno, obrazovanje za drugu šansu i mogućnost individualnog pristupa učeniku. Obrazovanje treba da promoviše interkulturalne kompetencije, demokratske vrednosti i poštovanje fundamentalnih prava i životne sredine kao

borbu protiv svih vrsta diskriminacije, pružajući svim mladima veštine da razvijaju pozitivan odnos sa svojim vršnjacima iz različitih sredina.

Strateški cilj 4: Unapređenje kreativnosti i inovacija, uključujući preduzetništvo na svim nivoima obrazovanja i obuke

Osim što omogućava lično ispunjenje, kreativnost je primarni izvor inovacije, koja je prepoznata kao jedan od ključnih pokretača održivog ekonomskog razvoja. Kreativnost i inovacije su ključne za razvoj preduzetništva i za evropsku konkurentnost sa svetom. Prvi izazov je promocija sticanja ključnih kompetencija za sve građane kao što su kompjuterska pismenost, učiti kako se uči, osećaj za inicijativu i preduzetništvo i svest o različitim kulturama.

Drugi izazov je obezbediti adekvatno funkcionisanje u trouglu obrazovanja – istraživanje – inovacije. Partnerstvo između sveta preduzetništva i različitih nivoa i sektora u obrazovanju, obuci i istraživanju može pomoći da se poboljša usmerenje na veštine i kompetencije koje su neophodne za tržište rada i negovanje inovacija i preduzetništva u svim oblicima učenja.

Šire zajednice znanja koje uključuju predstavnike civilnog društva i duge aktere treba promovisati radi stvaranja klime koja vodi ka kreativnosti i boljem odgovoru na profesionalne i društvene potrebe kao i dobrobit pojedinca.

DALJE SE SLAŽE da:

1. uz napore da se dostignu gorenavedeni strateški ciljevi i na taj način osigura efikasan doprinos nacionalnim reformama u periodu do 2020. godine sledeće principe treba uzeti u obzir:
 - a. evropsku saradnju u oblasti obrazovanja i obuke treba implementirati iz perspektive celoživotnog učenja koristeći na efikasan način metodu koordinacije (OMC) i razvijajući sinergiju između različitih sektora u oblasti obrazovanja i obuke. Uz puno poštovanje činjenice da su države članice odgovorne za svoje sisteme obrazovanja i dobrovoljnost kada je u pitanju evropska saradnju o oblasti obrazovanja i obuke, OMC treba da se osloni na:
 - navedena četiri strateška cilja za evropsku saradnju
 - zajedničke referentne alatke i pristupe
 - vršnjačko učenje i razmenu dobre prakse uključujući i diseminaciju ishoda
 - periodično praćenje i izveštavanje

- dokaze i podatke iz svih evropskih agencija , evropske mreže i međunarodnih organizacija
 - potpuno korišćenje mogućnosti koje su dostupne u programima zajednice, posebno u oblasti celoživotnog učenja
- b. Evropska saradnja u oblasti obrazovanja i obuke mora biti relevantna i konkretna. Mora pružiti jasne i vidljive ishode koje treba kontinuirano prezentovati, preispitivati i širiti na smislen način i tako uspostaviti bazu za kontinuiranu evaluaciju i razvoj.
 - c. Proces u Kopenhagenu na polju stručnog obrazovanja i obuke važan je aspekt evropske saradnje u okviru otvorenog metoda koordinacije. Njegov cilj i prioriteti koje treba dostići kao deo ovog procesa treba da doprinesu dostizanju ciljeva ovog okvira.
 - d. Radi podrške naporima država članica da modernizuju visoko obrazovanje i razviju oblast visokog obrazovanja u Evropi (European Higher Education Area), treba težiti bliskoj sinergiji sa Bolonjskim procesom, posebno u smislu instrumenata za očuvanje kvaliteta, priznavanja, mobilnosti i transparentnosti.
 - e. Inicijative EU u oblasti obrazovanja i obuke kao i one u oblasti sličnih politika treba da odlikuje relevantna međusektorska saradnja, posebno u oblasti zapošljavanja, preduzetništva, socijalne politike, politike u vezi sa mladima i kulturom. Posebno treba uzeti u obzir trougao znanja, obraćajući posebnu pažnju na sinergiju između obrazovanja, istraživanja i inovacija kao i na komplementarnost sa ciljevima Evropske oblasti za istraživanje.
 - f. Dobro funkcionisanje ove saradnje koristeći nove transparentne načine umrežavanja neophodno je između svih relevantnih institucija EU ali i sa relevantnim akterima koji imaju značajan doprinos u razvoju politika, implementaciji i evaluaciji.
 - g. Potrebno je osnažiti politički dijalog sa zemljama trećeg sveta i saradnju sa međunarodnim organizacijama i na taj način obezbediti izvor svežih ideja i konkurenciju.
 - h. Gde je moguće, finansijska sredstva iz Evropskih strukturnih fondova mogu biti iskorišćena za unapređenje sistema obrazovanja i obuke u skladu sa glavnim strateškim ciljevima i prioritetima država članica.
2. Uspeh otvorene metode komunikacije u oblasti obrazovanja i obuke zavisi od političke posvećenosti država članica i efikasnih metoda rada na evrop-

skom nivou. Iz ove perspektive i iz ugla veće fleksibilnosti, metode rada koje se koriste u evropskoj saradnji treba da budu zasnovane na:

- a. Radnim ciklusima: period do 2020. će biti podeljen na seriju ciklusa a prvi ciklus pokriva period od tri godine, od 2009. do 2011. godine.
- b. Prioritetne oblasti: za svaki ciklus, broj prioriternih oblasti za evropsku saradnju zasnovan na strateškim ciljevima biće usvojen od strane Saveta a na osnovu predloga Komisije. Evropske prioritne oblasti će biti kreirane tako da dozvole ili široku saradnju između svih država članica ili bliskiju saradnju između ograničenog broja članica u skladu sa nacionalnim prioritetima. Prioritetne oblasti za prvi ciklus u ovom okviru navedene su u Dodatku II.
- c. Zajedničko učenje: evropska saradnja u gorepomenutim prioritnim oblastima može biti ostvarena kroz vršnjačko učenje, konferencije i seminare, visok nivo ekspertskih grupa, panela, studija i analiza i saradnje preko interneta i gde je moguće, uključivanje ključnih aktera. Sve ove inicijative treba razvijati na osnovu jasnih mandata, vremenskih rasporeda i planiranih rezultata koje je predložila Komisija u saradnji sa državama članicama (pogledati odeljak f.).
- d. Diseminacija rezultata: kako bi povećali vidljivost i uticaj na nacionalnom i evropskom nivou, rezultate saradnje treba širiti među svim relevantnim akterima i gde je moguće, razgovarati na nivou Direktorata ili ministara.
- e. Izveštaj o napretku: Na kraju svakog ciklusa i u slučaju prvog ciklusa u ovom okviru, a ne pre 2012. godine Savet i Komisija treba da sastave novi izveštaj. Ovaj izveštaj treba da da procenu opšteg napretka u dostizanju ciljeva ovog okvira u poslednjem ciklusu i/ili posebnoj tematskoj oblasti koju treba da definiše Komisija u saradnji sa zemljama članicama (pogledati odeljak f.). Zajednički izveštaj treba da bude zasnovan na nacionalnim izveštajima od strane država članica kao i na postojećim informacijama i statističkim podacima. Ovaj zajednički izveštaj može biti sastavljen tako da uključuje analizu činjenica u različitim situacijama za pojedine zemlje članice uz njihovu punu saradnju. Zajednički izveštaj treba da posluži kao osnova za uspostavljanje novog niza prioriteta za sledeći ciklus.
- f. Proces praćenja: Radi promocije rezultata putem otvorenog metoda koordinacije kao i vlasništva nad ovim metodom i na nacionalnom

i na evropskom nivou, države članice i Komisija će zajedno raditi na upravljanju, unapređivanju i evaluiranju ovog procesa i njegovih ishoda.

3. Savet, u svetlu bilo koje velike promene u Evropi može pregledati i prepraviti strateški okvir, uključujući i referentne tačke i metode rada, a posebno imajući u vidu Strategiju EU za rast i razvoj poslova posle 2010. godine.

IMAJUĆI OVO U VIDU POZIVA DRŽAVE ČLANICE da:

1. rade zajedno, uz podršku Komisije i koristeći metodu otvorene koordinacije navedenu u ovim zaključcima unaprede evropsku saradnju u oblasti obrazovanja i obuke za period do 2020. godine na osnovu četiri strateška cilja i principa i metoda rada koji su gorenavedeni i oblasti prioriteta definisanih za svaki ciklus (one za prvi ciklus 2009 – 2011. godine nalaze se u Dodatku II)
2. razmotre, na osnovu nacionalnih prioriteta, usvajanje mera na nacionalnom nivou koje imaju za cilj da zadatke koji su navedeni u strateškom okviru i doprinose zajedničkom uspehu Evropskih referentnih tački koje su navedene u Dodatku I. Dalje treba da razmotre da li inspiracija može doći iz zajedničkog učenja na evropskom nivou kada se budu kreirale nacionalne politike u oblasti obrazovanja i obuke.

POZIVA KOMISIJU da:

1. radi sa državama članicama i pruži im podršku za period do 2010. godine za saradnju koja se zasniva na četiri strateška cilja, principima i metodama rada koji su goreopisani kao i referentnim tačkama i prioritetima koji su navedeni u Dodatku I i II.
2. razmotre putem izveštaja o napretku stepen u kome su ciljevi ovog okvira ostvareni. U dodatku, da sprovedu evaluaciju napretka u toku 2010. godine za dostizanje referentnih tački koje su definisane u radnom programu „Obrazovanje i obuka 2010.“.
3. rade na pripremi predloga mogućih referentnih tački u oblasti mobilnosti, zapošljivosti i učenja jezika kao što je navedeno u Dodatku I.
4. radi sa državama članicama na tome kako da unaprede postojeće indikatore, uključujući i one koje se odnose na osobe koje rano napuštaju obrazovanje i obuku, da naprave izveštaj Savetu do kraja 2010. godine o tome do koje mere je neophodno prilagoditi usklađen okvir indi-

katora i referentnih tački koje je Savet usvojio u maju 2007. kako bi osigurali slaganje sa strateškim ciljevima ovog okvira. U ovom okviru, posebnu pažnju treba obratiti na oblast kreativnosti, inovacije i preduzetništva.

Dodatak I

Evropski referentni nivoi postignuća

(„Evropske referentne tačke“)

Kao sredstvo za praćenje napretka i uočavanje izazova i doprinos politici zasnovanoj na dokazima, niz referentnih nivoa prosečnih evropskih performansi („Evropske referentne tačke“) treba da podrže strateške ciljeve koji su navedeni u zaključcima u tekstu iznad za period 2010-2020.

Ove referentne tačke nadovezuju se na već postojeće¹ koje su usvojene u okviru radnog programa „Obrazovanje i obuka 2010“. Ove tačke treba isključivo zasnovati na uporedivim podacima i uzeti u obzir različite situacije u pojedinim zemljama članicama. Na njih ne treba gledati kao na konkretne ciljeve koje pojedine zemlje treba da dostignu do 2020. godine. Zemlje članice treba da razmisle, na osnovu nacionalnih prioriteta i uzimajući u obzir promene ekonomskih okolnosti, kako i na koji način one mogu da doprinesu zajedničkom dostizanju Evropskih referentnih tački kroz akcije na nacionalnom nivou.

Na osnovu ovoga, države članice su dogovorile da će raditi na dostizanju sledećih referentnih tački:

Participacija odraslih u celoživotnom učenju

Radi povećanja participacije odraslih u obrazovanju odraslih i celoživotnom učenju, posebno za odrasle sa nedovoljno razvijenim veštinama:

- Do 2020. godine u proseku bar 15% odraslih treba da učestvuje u obrazovanju odraslih².

¹ Zaključci Saveta od 5-6. maja 2003. godine i Evropski referentni nivoi postignuća u obrazovanju i obuci (referentne tačke) (dok. 8981/03).

² Tj. procenat populacije starosti od 25 do 64 godine koja je učestvovala u obrazovanju u obuci četiri nedelje pre istraživanja (Istraživanje EUROSTAT-a/Radne Snage). Dobit imamo i od informacija o participaciji odraslih u celoživotnom učenju koje su prikupljene u istraživanju o obrazovanju odraslih.

Nisko postignuće u bazičnim veštinama

Radi omogućavanja svim učesnicima u obrazovanju da steknu adekvatan nivo bazičnih veština, posebno kada je u pitanju čitanje, matematika i prirodne nauke:

- Do 2020. godine procenat petnaestogodišnjaka koji su imaju nisko postignuće u čitanju, matematici i prirodnim naukama³ treba da bude manji od 15%.

Treći obrazovni nivo

Imajući u vidu povećanu tražnju za višim nivoima obrazovanja, uz sve uvažavanje stručnog obrazovanja i obuke:

- Do 2020. godine procenat populacije starosti od 30 do 34 godine koja je završila srednje obrazovanje (trogodišnje ili četvorogodišnje)⁴ treba da bude bar 40%.

Učenici koji rano napuštaju sistem obrazovanja i obuke

Kao doprinos naporima da maksimalan broj učenika završi započeto obrazovanje i obuku:

- Do 2020. godine procenat učenika koji rano napuštaju sistem obrazovanja i obuke⁵ treba da bude manji od 10%.

Predškolsko obrazovanje

Imajući u vidu povećanje broja dece koja pohađaju predškolsko obrazovanje koje je osnova za kasnije obrazovne uspehe, a posebno dece iz marginalizovanih grupa:

- Do 2020. godine najmanje 95% dece stare 4 godine i više treba da pohađaju predškolsko obrazovanje pre upisa u obavezno osnovno obrazovanje.

³ Izvor: OECD/PISA. (pravo na participaciju svih zemalja članica mora biti osigurano. Relevantni indikatori se moraju posebno pratiti.

⁴ Prim. prev.

⁵ Tj. procenat populacije starosti od 18 do 24 godine koji samo imaju srednju školu ili manje a koji više nisu u sistemu obrazovanja i obuke. (Istraživanje EUROSTAT/Radna snaga). Treba učiniti napore kako bi se povećao kvalitet podataka, uključujući i ispitivanje izvodljivosti korišćenje dodatnih izvora podataka.

U dodatku, Savet poziva Komisiju da dalje radi na sledećim oblastima:

Mobilnost

Imajući u vidu široko priznate koristi od mobilnosti i radi njenog povećanja, Komisija je pozvana da Savetu da predlog za referentnu tačku u ovoj oblasti do kraja 2020. godine, najpre se usmeravajući na fizičku mobilnost između zemalja u oblasti visokog obrazovanja, imajući u vidu i kvantitativni i kvalitativni aspekt kao i napore i ciljeve dogovorene u okviru Bolonjskog procesa, a koji su ponovo naglašeni na Konferenciji Leuven i Louvain-la-Neuve⁶. U isto vreme, poziva se Komisija da prouči mogućnost takve referentne tačke kako bi ona uključila i stručno obrazovanje i obuku i mobilnost nastavnika.

Zapošljivost

Imajući u vidu značaj povećanja zapošljivosti kroz obrazovanje i obuku kako bi se odgovorilo na trenutne i buduće izazove na tržištu rada, poziva se Komisija da Savetu priloži predlog za moguću referentnu tačku u ovoj oblasti do kraja 2020. godine.

Učenje jezika

Imajući u vidu značaj učenja dva strana jezika od malih nogu, kao što je naglašeno u zaključcima Evropskog saveta iz Barselone, marta 2002. godine, poziva se Komisija da Savetu do kraja 2012. godine preda predlog za moguće referentne tačke u ovoj oblasti koje se zasnivaju na trenutnom radu na razvoju jezičkih kompetencija.⁷

Dodatak II

Prioritetne oblasti za evropsku saradnju i obrazovanje u okviru prvog ciklusa: 2009 – 2011.

Radi dostizanja četiri strateška cilja iz okvira (ET 2020), identifikovanje prioritetnih oblasti za svaki radni ciklus treba da unapredi efikasnost Evropske

⁶ Saopštenje sa Konferencije evropskih ministara koji su odgovorni za visoko obrazovanje.

⁷ Zaključci Saveta o evropskom indikatoru za jezičke kompetencije (OJ C 172, 25.7.2006, str. 1).

saradnje u obrazovanju i obuci kao i da odgovori na individualne potrebe zemalja članica u svetlu novih okolnosti i izazova.

Prioritetne oblasti, kako je navedeno u odeljku 2 (b) i 2 (c) i delu „dalje se slaže da“ i u tekstu ispod pokazuje potrebu da:

- se nastavi saradnja u oblastima ključnih izazova
- se razvije saradnja u oblastima koje se smatraju posebno važnim za vreme ovog radnog ciklusa.

Države članice će, u skladu sa nacionalnim prioritetima izabrati one oblasti rada i saradnje u kojima žele da učestvuju u nastavku rada. Ukoliko države članice smatraju da treba, rad na specifičnim oblastima može da se nastavi u narednim radnim ciklusima.

Strateški cilj 1: Celoživotno učenje i mobilnost kao realnost

Nastavak rada na:

- **Razvoju strategija za celoživotno učenje:** završetak procesa implementacije nacionalnih strategija za celoživotno učenje, poklanjajući posebnu pažnju validaciji neformalnog i informalnog učenja i vođenja.
- **Evropskom okviru kvalifikacija (EQF):** u skladu sa preporukama Evropskog parlamenta i Saveta⁸ u aprilu 2008. godine, rade na povezivanju svih nacionalnih kvalifikacionih sistema sa EQF-om do 2010. godine i podrže korišćenje pristupa koji se zasniva na ishodima učenja za standarde i kvalifikacije, procedure za validaciju i procenjivanje, transfer bodova, nastavni plan i osiguranje kvaliteta.

Razvijanje saradnje:

- **Širenje mobilnosti u obrazovanju:** radimo zajedno kako bismo postepeno eliminisali barijere i uvećali mogućnosti za mobilnost kada je u pitanju obrazovanje u Evropi i svetu, na nivou visokog i ostalim nivoima obrazovanja, uključujući nove ciljeve i finansijske instrumente i uzimajući u obzir posebne potrebe marginalizovanih grupa.

⁸ OJ C 111, 6.5.2008.

*Strateški cilj 2: Unapređenje kvaliteta i efikasnosti obrazovanja i obuke***Nastavak rada na:**

- **Učenju jezika:** omogućavanje građanima da komuniciraju na dva jezika pored svog maternjeg jezika, promovisanje učenja jezika, gde je potrebno, u srednjim stručnim školama i za odrasle i pružanje mogućnosti imigrantima da nauče jezik zemlje u koju su se doselili.
- **Profesionalnom razvoju nastavnika i trenera:** fokusiranje na kvalitet osnovnog obrazovanja i podrška nastavnicima na početku karijere, fokusiranje na podizanje nivoa kvaliteta mogućnosti za kontinuirano profesionalno usavršavanje nastavnika, trenera i ostalog osoblja (tj. osoblja koje je deo upravljačkih struktura ili deo tima za savetovanje).
- **Upravljanju i finansiranju:** promocija programa za modernizaciju visokog obrazovanja (uključujući i nastavne planove) i okvira za osiguranje kvaliteta u srednjim stručnim školama, razvoj kvaliteta pružaoca usluga uključujući i osoblje u oblasti obrazovanja odraslih. Promovisanje politike i prakse zasnovane na znanju sa posebnim naglaskom na uspostavljanju održivosti za javne i, gde je to primenljivo, privatne investicije.

Razvijanje saradnje kada su u pitanju:

- **Bazične veštine čitanja, matematike i prirodnih nauka:** istraživanje i širenje dobre prakse i rezultati istraživanja o sposobnosti čitanja među učenicima i izvlačenje zaključaka o poboljšanju nivoa pismenosti u celoj Evropskoj uniji. Intenziviranje postojeće saradnje kako bi se unapredila znanja iz matematike i prirodnih nauka na višim nivoima obrazovanja i obuke i poboljšao način predavanja prirodnih nauka. Konkretno akcije neophodne su kako bi se unapredio nivo bazičnih veština, uključujući i odrasle.
- **„Nove veštine za nove poslove“:** procena zahteva za novim veštinama i njihovo uklapanje sa potrebama tržišta rada treba da na adekvatan način bude deo procesa planiranja obrazovanja i obuke.

Strateški cilj 3: Promocija jednakosti, društvene kohezije i aktivnog građanstva

Nastavak rada na :

- **Smanjivanju ranog napuštanja sistema obrazovanja i obuke:** raditi na preventivnom pristupu, razvijati bolju saradnju između opšteg i stručnog obrazovanja i uklanjanje barijera za povratak onih koji su izašli iz sistema obrazovanja i obuke da se u njega vrate.

Razvijanje saradnje u oblasti:

- **Predškolskog obrazovanja:** promovisanje opšteg pristupa zasnovanog na jednakosti i dalji nastavak podizanja kvaliteta pružaoca usluga u obrazovanju i podrška nastavnicima.
- **Imigranata:** razvijanje međusobnog učenja na osnovu najboljih praksi u obrazovanju učenika koji su imigranti.
- **Učenika sa posebnim potrebama:** promocija inkluzivnog obrazovanja i individualnog pristupa učeniku putem uvremenjene podrške, rane identifikacije posebnih potreba i dobro koordinisane usluge. Integrisanje usluga u redovnim školama i omogućavanje načina za dalje obrazovanje i obuku.

Strateški cilj 4: Povećanje inovacija i kreativnosti, uključujući i preduzetništvo na svim nivoima obrazovanja i obuke:

Nastavak rada na:

- **Razvoju transverzalnih ključnih kompetencija:** u skladu sa preporukama Evropskog parlamenta i Saveta iz decembra 2006⁹, više obraćanje pažnje na transverzalne ključne kompetencije u nastavnim planovima, procenama i kvalifikacijama.

Razvijanje saradnje u oblasti:

- **Razvoja institucija koje neguju inovativnost:** promocija kreativnosti i inovacije putem razvijanja specifičnih metodologija nastave i učenja

⁹ OJ L 394, 30.12.2006, str. 10.

(uključujući korišćenje novih informacionih tehnologija i obuku nastavnika).

- **Razvoja partnerstva:** razvijanje partnerstva između pružaoca usluga u oblasti obrazovanja i obuke i biznis sektora, istraživačkih institucija, organizacijama koje se bave kulturom i kreativnošću i promovisanje trougla znanja koji dobro funkcioniše

Prevela Marijana Todorović

Hronika, Kritika i Polemika

Konferencija: Svako vreme je dobro za učenje – pregled rezultata Akcionog plana EU

Od devedesetih godina prošlog veka, kada su zemlje Evropske unije prepoznale moć obrazovanja i učenja odraslih u ostvarivanju dugoročnih ciljeva svoje ekonomske i socijalne politike, usledio je ceo niz akcija, projekata i programa iz ove oblasti. Dokumenti i preporuke Evropske komisije služile su kao orijentir i usmeravale aktivnosti u oblasti obrazovanja odraslih.

Jedan od takvih dokumenata je i *Akcioni plan* Evropske komisije *Svako vreme je dobro za učenje*, donet za period 2008–2010. Na kraju trogodišnjeg perioda implementacije održana je završna konferencija na kojoj je trebalo napraviti pregled rezultata postignutih tokom implementacije, identifikovati glavne izazove sa kojima će se obrazovanje i učenje odraslih suočavati u Evropi do 2020. i dobiti povratnu informaciju od učesnika o budućim aktivnostima, potrebama i problemima.

U skladu sa tradicijom uspostavljenom ranih devedesetih, svaka zemlja tokom svog predsedavanja Evropskom unijom organizuje makar jedan skup posvećen obrazovanju i učenju odraslih. Datum završne konferencije koincidirao je sa predsedavanjem Mađarske, pa je konferencija održana od 7. do 9. marta 2011. u Budimpešti, u saradnji sa mađarskim Ministarstvom za zapošljavanje. Na njoj je učestvovalo 35 zemalja – preko 250 predstavnika, uključujući Savet Evrope, OECD, Ekonomski i socijalni komitet EU, predstavnike vlada, civilnog društva i privatnog sektora.

Konferenciji je prethodila sesija posvećena obrazovanju i učenju odraslih u Mađarskoj, sa nizom primera dobre prakse. Glavni deo konferencije organizovan je kroz uvodne govore, intenzivne diskusije u panelu i rad u radnim grupama. Uvodne govore održali su Deputy Director-General Xavier Prats Monné (Generalni direktorat za zapošljavanje, socijalna pitanja i jednakost šansi), Sándor Czomba (mađarsko Ministarstvo za zapošljavanje), prof. Maria João Rodrigues (specijalni savetnik Evropske komisije), prof. Gábor Halász (Univerzitet Eötvös Loránd u Mađarskoj) i Bernard Hugonnier (Direktorat za obrazovanje u OECD-u). Radna grupa je predstavila izveštaj o trogodišnjoj intenzivnoj saradnji

zemalja članica EU u obrazovanju odraslih, a prezentovano je i nekoliko ključnih studija iz ove oblasti.

Učesnici su bili saglasni u oceni da je *Akcionni plan* imao veoma značajnu ulogu u promovisanju učenja i obrazovanja odraslih, uprkos velikim razlikama koje postoje među pojedinim zemljama o tome kako se shvata obrazovanje i učenje odraslih. Potvrđena je velika prednost posedovanja ovakvog zajedničkog okvira kao što je *Akcionni plan*, koji istovremeno nudi smernice, predstavlja instrument za praćenje, poređenje i planiranje, ali može imati efekte i u diskusijama sa nacionalnim ministarstvima i socijalnim partnerima. Korišćenje zajedničkog okvira pokazalo se kao potvrda da deviza *Učimo jedni od drugih* ima ogromno polje praktične primene u kreiranju politike i u unapređenju prakse. Istaknuta je i spremnost da se sa ovakvim pristupom nastavi.

Na ovom impozantnom skupu, koji je okupio glavne aktere evropskog obrazovanja odraslih, mešali su se pozitivan duh i optimizam sa osećajem zabrinutosti za budućnost obrazovanja odraslih u Evropi. S jedne strane dominiralo je uverenje da su učenje i obrazovanje odraslih jedan od glavnih načina da se pojedinci i društva suoče sa različitim izazovima, među kojima se ističu ekonomska kriza, demografske promene (naročito starenje stanovništva i migracije), nova politička previranja, interkulturalni problemi, ekološke krize, nova uloga građanskog aktivizma i drugi. S druge strane sa zabrinutošću se prati mogućnost smanjenja budžeta *Integrisanog programa za celoživotno učenje* i mesto *Grundvig* programa u njemu, kao i neizvestan termin novog *Akcionnog plana* Evropske komisije.

Konferencija se osvrnula na neke od krupnih problema koji čine realnost Evropske unije: broj onih koji ne participiraju u obrazovanju odraslih je za 50 miliona veći nego pre 10 godina, 76 miliona ljudi nije dovoljno obrazovano niti stručno obučeno, dok skoro trećina radne snage ne poseduje u zadovoljavajućoj meri ključne kompetencije. Pri tom se obrazovanje i učenje odraslih i dalje suočavaju sa problemima nedovoljnog finansiranja, nepostojanja integrisanog pristupa u kreiranju politike, nedovoljnih podataka, nepostojanja balansa između formalnog i neformalnog obrazovanja, niske motivacije i slabog učešća, nedovoljno obučenog kadra, nefleksibilnih metoda poučavanja, nedovoljno razvijenog sistema validacije prethodnog učenja, slabo razvijenog sistema vođenja i savetovanja itd.

I na ovoj konferenciji vidljiv je bio napor da se održi ravnoteža između dva pristupa obrazovanju i učenju odraslih u Evropskoj uniji – prvog, koji promovise obrazovanje za zapošljivost, insistirajući na konkurentnosti i kompetitivnosti, i drugog, koji obrazovanje vidi u funkciji socijalne inkluzije, podstičući građanski aktivizam, interkulturalizam i integraciju. Učenje odraslih pomaže da ljudi *izvuku maksimum iz svog života i rada* – moto je koji treba da ukratko odrazi ovaj kontinuirani evropski napor da se ne zapadne u ekonomizam i ne podlegne

neoliberalnoj koncepciji obrazovanja. Zapošljivost i inkluzija treba da idu *ruku pod ruku*, istaknuto je na konferenciji, a dat je i niz konkretnih primera dobre prakse i iskustava koja ilustruju kako je to moguće. Od naročitog je značaja, ne samo u ovom kontekstu već i šire, insistiranje na komplementarnosti opšteg i stručnog obrazovanja. Jedan od načina da se to ostvari je i razvijanje transverzalnih ključnih kompetencija, zatim saradnja škola, sistema stručnog obrazovanja i obuke i institucija visokog obrazovanja. Validacija ishoda učenja preporučena je kao mogućnost efikasnog povezivanja ovih sistema.

Konferencija je kao glavni problem istakla nedovoljnu participaciju u učenju i obrazovanju odraslih i kao ključni zadatak za 21. vek odredila njeno podizanje.

Završni izveštaj konferencije sumirao je prioritete koje su učesnici izdvojili tokom plenarnih sesija i radnih grupa, radi razvoja jakog i odgovornog sektora obrazovanja odraslih:

- Pomoći odraslima koji imaju nizak nivo obrazovanja i stručnih veština da steknu ključne kompetencije za život i rad, naročito pisanje, računanje i digitalnu pismenost;
- Razviti kvalitetan sistem savetovanja i vođenja, koji će pomoći odraslima da naprave prave izbore i sačine sopstvene planove za celoživotno učenje;
- Razviti način da se zadovolje individualne potrebe svakog ko uči, što treba da bude podržano nizom metoda i upotrebom ICT, kao i visokokompetentnim nastavnicima koji će im pomoći u nalaženju puta u društvo znanja, i to tako što će na najbolji način iskoristiti svoje sposobnosti;
- Uspostaviti centre za učenje u lokalnoj zajednici, povezane sa okruženjem, čime bi se i učenju odraslih dalo značajnije mesto u njoj, uz važnu ulogu državnog sektora i snažno partnerstvo na svim nivoima;
- Značajan doprinos institucija visokog obrazovanja, koje imaju dvostruku ulogu – da se više otvore za odrasle studente i da obezbede istraživanja i naučnu analizu ove oblasti;
- Značajno povećati sumu znanja o sektoru obrazovanja i učenja odraslih;
- Unaprediti stručno usavršavanje kadra koji radi u ovoj oblasti u kontekstu brige o održanju i unapređenju kvaliteta;
- Razvijati dinamičan sektor *učenja za dug život* – za aktivno, autonomno i zdravo starenje, što uključuje intergeneracijsko učenje i solidarnost

među generacijama, kao i što bolje korišćenje socijalnih, kulturnih i ličnih resursa.

Senka koja se posle izbijanja ekonomske krize nadvila nad obrazovanje odraslih bila je приметna i na ovoj konferenciji. Jasno je da se za ovako ambiciozno postavljene ciljeve ne može računati na povećanje budžeta – naprotiv, postoji tendencija njegovog smanjivanja. Zato se insistiralo na što boljem, efektivnijem i kreativnijem korišćenju postojećih kapaciteta, uz preporuke za međuministarsku saradnju (naročito ministarstva obrazovanja, rada i zapošljavanja, zdravlja, pravde), na šta navode i istraživanja o pozitivnim efektima obrazovanja u smislu ušteda u oblasti zdravstva, smanjenja delinkvencije i kriminala itd.

Isticanje uloge civilnog društva je još jedan izraz potrebe za balansiranjem u politici i pristupu EU problemima obrazovanja odraslih. U ovom slučaju se insistiralo na ravnopravnom učešću raznovrsnih partnera, pri čemu organizacije civilnog društva imaju veoma važnu ulogu u oblasti neformalnog i informalnog učenja. Veoma je širok spektar mesta i načina za odvijanje ove vrste učenja – od samog radnog mesta, pa do novih socijalnih mreža, a pri tome se i uloga nastavnika znatno menja – on je sve više onaj koji koordinira proces učenja i vodi onog ko uči ka procesu pune autonomije.

Osim postignutih rezultata u trogodišnjem periodu i postojećih problema, konferencija je registrovala i niz slabosti i propusta u implementaciji *Akcionog plana*. Izveštaj koji sve ovo obuhvata biće predmet razgovora ministara obrazovanja zemalja EU, a Evropska komisija će početi pripreme za pisanje novog *Akcionog plana*, koji bi trebalo da doprinese punom prepoznavanju značaja obrazovanja i učenja odraslih u ostvarivanju niza benefita za evropska društva.

Katarina Popović

Treći susret andragoga Srbije: „Andragoški dan 3“

Klub studenata andragogije, Katedra za andragogiju Filozofskog fakulteta u Beogradu, Institut za pedagogiju i andragogiju i Društvo za obrazovanje odraslih organizovali su 25. i 26. decembra 2010. godine na Filozofskom fakultetu u Beogradu Treći susret andragoga Srbije „*Andragoški dan 3*“.

Osnovna tema Trećeg susreta andragoga bilo je funkcionisanje Društva andragoga Srbije, novoosnovane profesionalne asocijacije andragoga. Koliko je tema važna i koliko je andragozi smatraju bitnom za jačanje profesije andragoga, pokazuje i činjenica da je ovogodišnji susret okupio preko 150 andragoga Srbije. Učesnike Andragoškog dana najpre je pozdravila prof. dr Nada Kačavenda-Radić, šef Katedre za andragogiju Filozofskog fakulteta u Beogradu, zatim prof. dr Dušan Savićević, osnivač i utemeljivač Katedre za andragogiju, i doc. dr Aleksandra Pejatović, upravnik Instituta za pedagogiju i andragogiju. Rad Trećeg susreta andragoga Srbije moderirala je Jelena Jakovljević, savetnik-koordinator u Centru za stručno obrazovanje i obrazovanje odraslih Zavoda za unapređivanje obrazovanja i vaspitanja, koja je svojim nenametljivim profesionalizmom uticala kako na efikasnost rada u toku ovog dvodnevnog susreta, tako i na razvijanje svesti o zajedničkom pripadanju profesiji i želji da na poboljšanju statusa andragoške profesije u društvu zajednički radimo.

Posebnu draž ovogodišnjeg susreta predstavlja i činjenica da su se po prvi put na jednom mestu u tako velikom broju okupili andragozi, profesionalci iz različitih krajeva Srbije, sa različitim profesionalnim iskustvom u obrazovanju odraslih, i studenti svih godina andragogije. Otuda ne iznenađuje što se na početku susreta razvio pravi „*Andragoški intergeneracijski dijalog*“ u kom su studenti, sa jedne strane, nastojali da saznaju što više od svojih kolega andragoga o osobenostima, prednostima, nedostacima profesionalnog bavljenja obrazovanjem odraslih u Srbiji, a profesionalci, s druge strane, o nastavnim planovima i programima na studijskoj grupi za andragogiju, promenama koje se nastoje uvesti u proces studiranja... Utisak svih prisutnih je da je ovaj intergeneracijski dijalog nedostajao „i jednoj i drugoj strani“, da je mogao da potraje i znatno duže, što je možda ideja o kojoj treba razmisliti, pa susrete diplomiranih andragoga i studenata andragogije organizovati kada god to prilike dozvole.

Drugi deo prepodnevnog rada obuhvatao je rad u paralelnim grupama. Učesnici Andragoškog dana su se prema svojim preferencijama opredeljivali za rad u jednoj od četiri ponuđene grupe. U okviru svake radne grupe, učesnici su bili u prilici da saznaju nešto o andragoškim novinama u praksi. Naime, četiri teme koje su obrađivane u ovom delu rada, predstavljaju, na neki način, nove oblasti u kojima je profesija andragog za kratko vreme pronašla svoje mesto. Prezentatori i teme koje su obrađivane u ovom delu rada su: Svetlana Živanić, *Akreditacija programa obuke u oblasti socijalne zaštite – iskustva i perspektive*; Marijana Radulović, *Mesta susretanja psihodrame i edukacije*; Dušan Jovanović, *Talent menadžment*; Dragoljub Matić, *NLP – Komunikaciona tehnologija za XXI vek*. Još jednom se pokazalo da su andragozi željni upoznavanja sa novim tendencijama i iskustvima iz prakse učenja i obrazovanja odraslih.

Popodneveni rad bio je usmeren na stvaranje koncepta *Kodeksa etike andragoga Srbije*. Bila je to prilika da se započne kako razgovor o ovoj temi važnoj za unapređenje statusa andragoške profesije, tako i rad na njoj – formirana je radna grupa koja će razmotriti predloge u vezi sa izradom Kodeksa iznete u toku popodnevnog rada i nastaviti da se bavi ovim važnim pitanjem, kako bismo uskoro imali razvijen kodeks profesionalne etike.

Radni deo prvog dana Trećeg susreta andragoga Srbije završen je prezentovanjem „*Andragoškog dnevnika*“ – studentskog viđenja i razumevanja važnih događaja i aktivnosti koje su obeležile razvoj teorije i prakse obrazovanja odraslih u prethodnoj godini. Za veliki trud i još veći talenat koji su ispoljili u tih 30 minuta izveštavanja, bili su nagrađeni ogromnim aplauzom. U takvom raspoloženju, nastavljen je neformalni deo Andragoškog dana, na večeri i druženju.

Drugi dan andragoškog susreta započet je prezentacijama doc. dr Kristinke Ovesni „*Andragoški kadrovi – profesija i profesionalizacija*“ i doc. dr Aleksandre Pejatović „*Razvoj znanja i veština budućih andragoga – a pomalo i o diplomiranim*“, kojima su učesnici uvedeni u rad na temi-okosnici ovogodišnjeg susreta. Nakon toga, učesnicima su prezentovani rezultati mini istraživanja o profesionalnom statusu andragoga danas u našoj zemlji. Naime, sami učesnici su zamoljeni da za svaku od navedenih karateristika profesije prikazanih u tabeli 1. označe koliko je, prema njihovom mišljenju, razvijena kada je reč o andragoškoj profesiji. Prikazani rezultati ukazuju na sledeće:

- Visokoškolsko obrazovanje (dug ulazak u profesiju), težnja za savršenstvom (stalna težnja za daljim razvojem profesije), sistemski teorijski fond znanja (razvijen pojmovni aparat, teorijska zasnovanost, metodologija rada, zakonska osnova) se procenjuju kao najbolje razvijene karakteristike andragoške profesije.

- Monopol na stručnu ekspertizu (stručna ekspertiza od strane države prepuštena profesionalcima u određenoj oblasti), društvena kontrola i društvene sankcije (državna kontrola, društvene sankcije za loše obavljanje profesije), stepen spoljašnje prepoznatljivosti (prepoznatljivost profesije od strane klijenata; znaju kome mogu da se obrate radi zadovoljavanja određene potrebe) se prepoznaju kao najnerazvijenije karakteristike kada je reč o profesiji andragog.

Tabela 1: Profesionalni status andragoga

Karakteristike profesije	Minimum	Maksimum	Sr. vrednost
Monopol na stručnu ekspertizu	1	2	1.12
Društvena kontrola i društvene sankcije	1	2	1.16
Stepen spoljašnje prepoznatljivosti	1	2	1.18
Kodeks profesionalne etike	1	3	1.36
Autonomija i autoritet	1	3	1.36
Profesionalno udruživanje	1	3	1.46
Trajno bavljenje zanimanjem	1	3	1.54
Profesionalna supkultura	1	3	1.56
Uslužna orijentacija	1	3	1.76
Sistemske teorijske fond znanja	1	3	1.94
Težnja za savršenstvom	1	3	2.08
Visokoškolsko obrazovanje	1	3	2.18

Nenametljivo se postavilo pitanje: koliko bi Društvo andragoga Srbije moglo da utiče na razvijenost svih navedenih karakteristika koje profesiju čine profesijom. Odgovori na to pitanje, provlačili su se kroz dalji rad, koji je do sada bio organizovan u paralelnim grupama.

Učesnici su se najpre bavili utvrđivanjem *stanja i potreba andragoške profesije*. Rad je bio organizovan oko sledećih pitanja: mogućnosti i problemi pri zapošljavanju andragoga; zakoni i podzakonski akti na koje se andragozi oslanjaju u svom radu i problemi sa kojima se susreću u njihovoj primeni; znanja i veštine koja andragozima nedostaju u radu, a koja se traže na tržištu rada; organizacije/institucije sa kojima andragozi saraduju; informacije koje im nedostaju.

Drugi deo rada odnosio se na utvrđivanje *mogućnosti i rešenja za unapređenje andragoške profesije*, a pitanja oko kojih je rad bio organizovan obuhvatala su sledeće: na koji način Društvo andragoga Srbije (DAS) može da doprinese rešavanju problema pri zapošljavanju andragoga; koje su nadležne institucije i prioritete za izmenu zakonske regulative; da li nedostajuća znanja i veštine treba da uđu u fakultetski program ili su to pojedinačni programi obrazovanja/obuke/

seminara itd.; koje su teme za obrazovne programe, skupove, projekte; na koji način komunicirati, odnosno davati i dobijati informacije od DAS-a.

Rezultati dobijeni u ovom radu predstavljaju dragocen materijal za dalje planiranje aktivnosti na kojima će Društvo andragoga Srbije raditi.

Ovogodišnji susreti andragoga završeni su „*Andragoškom prognozom*“, jednom od tzv. festivalskih aktivnosti kojom su studenti andragogije ispratili ovaj Andragoški dan. „Andragoška prognoza“ predstavlja odgovore naših sugrađana na pitanje: šta biste voleli da naučite u sledećoj godini, a koje su dopisivali na panoima postavljenim na ulaznim vratima Filozofskog fakulteta. Tako „istražene“ obrazovne potrebe, pokazuju da bi naši sugrađani voleli da nauče razne aktivnosti – od šivenja, pletenja, letenja paraglajderom do toga da nauče kako da uče.

Studenti andragogije koji su učestvovali u organizaciji ovog Andragoškog dana pokazali su da je budućnost andragogije svetlija no što se na momente čini. Naime, svojim talentom, kreativnošću, neiscrpnom energijom i „novim pristupom“ obrazovanju odraslih, uspeali su da celokupnom susretu dodaju jednu novu, posebnu dimenziju, koju je možda moguće nazvati „festivalsko-društveno odgovornom dimenzijom“. Osmišljene tzv. propratne aktivnosti Trećeg susreta andragoga, otvorile su vrata Filozofskog fakulteta svim zainteresovanima koje su privukli kako postavljeni štandovi u holu fakulteta na kojima su se održavale eko-radionice (pravljenje ukrasnih predmeta i nakita od recikliranog materijala), origami-radionice, prodaja rukotvorina naših starijih sugrađana iz Dnevnog centra i kluba za starije opštine Voždovac, tako i akcija razmene znanja i veština, organizovana preko razmene receptata ili saveta o nečemu što znaju i žele da podeli sa drugima. U holu fakulteta „čeka“ ih je i Kolb, tačnije njegov instrument za utvrđivanje stila učenja, koji su mnogi rado popunjavali uz ponuđen čaj. Prednovogodišnja atmosfera bila je obogaćena i poklonima koje su studenti delili sugrađanima: bilo je tu i novogodišnjih ukrasa, i čokoladnih kuglica, ali je za svaku od njih bila prikačena jedna izreka o učenju i potrebi učenja tokom celog života. Idejom da „ulaznica“ za ovogodišnji Andragoški dan bude jedna knjiga koju bi naši andragogi poklonili svojim starijim sugrađanima, korisnicima Dnevnog centra i kluba za starije opštine Voždovac, studenti su pokazali da za društveno odgovorno ponašanje nije potrebno mnogo, već sasvim malo volje. Sakupljeno je preko 120 knjiga koje su poklonjene Dnevnom centru i klubu za starije opštine Voždovac.

Da je *Andragoški dan 3* ispunio očekivanja svih, i organizatora i učesnika susreta, možda najjednostavnije a najslikovitije pokazuje komentar jednog od učesnika koji je ostao zapisan u evaluacionom listu susreta: „Kao ponovo rođen u profesionalnom smislu, već počinjem da osećam pripadnost strukovnom udruženju, što mi jača samopouzdanje“.

Zorica Milošević

Intervju: Osnivanje Društva andragoga Srbije - još jedna podrška profesiji

(Intervju sa Violetom Orlović, predsednicom Društva andragoga Srbije)¹

N. Koruga: *Davne 1964. godine sve je počelo na Letnjoj školi u Poreču. Gde se danas rađaju ideje o razvoju naše profesije?*

V. Orlović: Danas smo okruženi različitim idejama i procesima koji utiču na razvoj naše profesije. Sigurno da se ideje o razvoju najpre javljaju u umovima mladih andragoga, kao i u umovima onih koji vole ovu oblast. Zapravo, svesni smo toga da se danas sve više priča o značaju obrazovanja odraslih. Sva međunarodna dokumenta koja se tiču naše oblasti kako na evropskom, tako i na svetskom nivou, zatim nedavno održana Konfinte VI govore o tome da bez obrazovanja nema ni održivog razvoja, nema ispunjenja milenijumskih ciljeva. Možda u Srbiji ponekad i nema dovoljno razloga za optimizam, ali upravo se zbog toga borimo za status naše profesije. Sve to kreira potrebu i prostor za naš bolji profesionalni status. Mislim da je danas obrazovna scena sigurno življa nego što je bila devedesetih i početkom dvehiljaditih, a opet s jedne strane drugačija u odnosu na ono što je bilo šezdesetih, sedamdesetih kada se dogodio izvesni procvat obrazovanja odraslih, ali zaista u drugim okolnostima. Mislim da naše vreme tek dolazi.

N. Koruga: *Koje su to promene i/ili potrebe dovele do osnivanja Društva andragoga Srbije?*

V. Orlović: Upravo su to promene na globalnom nivou koje sam pomenula, a kod nas su se stekli raznorazni uslovi. Postali su nam dostupni neki evropski i međunarodni projekti koji su okupili andragoške snage oko mogućnosti da se primene znanja koja smo godinama sakupljali. Zaista je bilo teško devedesetih godina ostvariti neki andragoški projekat, prodreti više u praksu i doći do donatora. Međutim, na svu sreću to se dvehiljaditih menja. Značajna je uloga Društva za obrazovanje odraslih koje je donelo upravo te nove mogućnosti i koje je podstaklo sam rad i nastanak Društva andragoga Srbije. Takođe, na tržištu rada

¹ Intervju vodio Nikola Koruga, Klub studenata andragogije, Beograd, 10. 03. 2011.

se javljaju nove potrebe u različitim oblastima. Svesni smo da se u oblasti ljudskih resursa širi mogućnost za andragoge, a opet oni su nedovoljno prisutni s obzirom na mogućnosti. Mnogo je projekata, mnogo pozicija koje se odnose na organizovanje obuke, na obezbeđivanje kvaliteta obuke gde opet nema dovoljno andragoga. Očigledno je da je prostor veliki, ali i da naša profesija mora da jača kako bi nas prepoznali kao potrebne ljude koji će na najbolji način zauzimati te pozicije. Mislim da su to neke od glavnih potreba koje su dovele do osnivanja Društva andragoga Srbije.

N. Koruga: *Kada ste počeli sa radom na konstituisanju DaS-a i kako je tekao taj proces?*

V. Orlović: Prošle godine. Zapravo u poslednje tri godine. Kada su počeli da se organizuju andragoški dani i ta inicijativa je rasla. Pored Društva za obrazovanje odraslih, katedra je godinama podsticala rad i prethodnog Andragoškog društva Srbije, ali u drugim uslovima. Mislim da su ti naponi katedre i onih koji su se najviše angažovali na pripremi Strategije obrazovanja odraslih i akcionog plana i zakona zaista jaki, ali s druge strane bili bismo sigurno još jači da smo imali organizovano profesionalno udruženje. Upravo su to bili razlozi što je tokom Drugog andragoškog dana pokrenuta inicijativa i formiran odbor od desetak ljudi koji su se volonterski angažovali sa puno ljubavi i raspoloživim mogućnostima uobličili ideju o tom novom udruženju. Dakle, između dva andragoška dana, tj. između 2009. i 2010. godine napravljen je taj formalni korak osnivanja i registrovanja Društva andragoga Srbije. Dosta smo vremena uložili pokušavajući da ostvarimo kontinuitet sa Savezom andragoških društava Jugoslavije, pa sa Andragoškim društvom Srbije želeći da na taj način sačuvamo tradiciju. Međutim, to je administrativno bilo jako komplikovano, a s druge strane sada smo Društvo andragoga Srbije definisali zaista kao profesionalno udruženje andragoga, što ranije nije bio slučaj. Ranije su, jednostavno, članovi mogli biti oni koji se bave obrazovanjem odraslih, a da nisu profesionalni andragozi.

N. Koruga: *Dakle, oni koji se samo osećaju andragozima ne mogu da postanu članovi Društva?*

V. Orlović: Redovni članovi mogu da budu samo andragozi. Međutim, postoje još dve kategorije pridruženih i počasnih članova. Pridruženi su članovi oni koji se bave ovom oblašću bilo da su iz naše ili iz drugih država, odnosno i andragozi koji ne žive na teritoriji Srbije. Pod počasnim članovima misli se na ljude koji nisu neophodno andragozi, ali su dosta doprineli ovoj oblasti. Ono što Društvo namerava da ponudi svojim članovima je pre svega promovisanje profesije andragog, potom sistematizovanje i organizovanje informacija o tome ko su andragozi i gde se nalaze. Dakle, pre svega ćemo poći od baze podataka.

Poboljšaćemo komunikaciju među članovima i ponudićemo informacije u vezi sa publikacijama, izdanjima, skupovima, mogućnostima volontiranja za studente itd. Razvijaćemo početne vidove umrežavanja, tekuće projekte, mogućnosti uključivanja u projekte... Sve to što sada pričam je i deo programa rada Društva andragoga Srbije za ovu godinu. Takođe, sve će to biti deo sadržaja sajta koji je u izradi. Dakle, pružiće se jedna mogućnost interaktivnog komuniciranja putem sajta – kako se priprema akcioni plan, završetak rada i javna rasprava o Zakonu o obrazovanju odraslih. Nameravamo da postavimo forum na sajt kako bi stvorili šansu za andragoge da se zaista aktivno uključe u važne procese.

N. Koruga: Polako uvodimo aktivnosti Društva u priču. Recite mi, koji su ciljevi ove organizacije?

V. Orlović: Dakle, prvi cilj je ono o čemu sam pričala, a to je promocija profesije andragog. Naravno, na vrhu lestvice je promocija koncepcije doživotnog učenja i promocija andragogije kao nauke, potom povezivanje andragoga i širenje prostora za profesionalne angažmane, lobiranje i delovanje prema državi u smislu poboljšanja statusa profesije, bolje primene zakona, usklađivanja sa drugim zakonima koji su aktuelni i dodiruju našu oblast i naravno mogućnost plasiranja znanja opet na dvosmernom nivou, kao i većeg učešća andragoga u razmeni znanja bilo u okviru obuka, skupova, konferencija, publikovanja i s druge strane činjenje dostupnim objavljenih radova, knjiga i slično. S tim u vezi Društvo planira da radi na otkupljivanju jednog broja međunarodnih publikacija koje možda nisu dostupne u celini i postavljaje ih na sajt pod šifrom koju će imati članovi.

N. Koruga: Šta pripadnike DaS-a izdvaja u odnosu na druga profesionalna udruženja?

V. Orlović: Mislim da smo još uvek mladi kao profesija. Tek pre dvadesetak godina andragogija se osamostalila kao grupa i mislim da ljudi poseduju još uvek dozu entuzijazma i vezanosti za profesiju svesni toga da smo još pioniri, te se treba boriti za status. Mislim da imamo potrebu za podrškom i da se samim tim javlja i veća potreba za udruživanjem. Upravo to nas nekako određuje s jedne strane, dok s druge strane možda imamo najjaču snagu da promovišemo to što zapravo mnogi drugi pormovišu, a to je doživotno učenje i potreba za obrazovanjem.

N. Koruga: Može li i na koji način DaS dovesti u ravnotežu terazije na čijem se suprotnom tasu nalazi država?

V. Orlović: Da, to zavisi od svih nas. Sada kada se pomene država moja prva asocijacija je zakon koji je u pripremi. I to će sigurno biti prilika, odnosno javna rasprava o njemu, da andragozi daju svoj glas i svoj doprinos rešavanju ovog začajnog pitanja. Postojanje udruženja, kao što se već pokazuje, može stvarno da

obezbbedi jačanje tog glasa. Naši predstavnici su već u komisijama koje se bave unapređenjem stručnog obrazovanja, kao i u grupama koje su okupljene oko različitih projekata. Izuzetno je značajno kada se pojedinačno neko angažuje i kada se kaže da je to predstavnik Udruženja andragoga, jer ipak iza toga stoje stotine glasova. Bez nekih velikih obećanja, mislim da ćemo sada imati pravu priliku da utičemo da zakon, koji je pred nama, bude usvojen onakav kakav bi trebalo da bude.

N. Koruga: *Granice profesionalnih udruženja i asocijacija su jasne u socijalnom, ali ne i u geografskom smislu. Ko će sve biti budući strateški partneri DaS-a?*

V. Orlović: Biće to sigurno slična udruženja iz regiona, kao i slična i mnogo jača udruženja na evropskom nivou. Tokom poslednjeg andragoškog dana identifikovali smo partnere sa kojima naše potencijalno članstvo, odnosno naše kolege saraduju. Spisak je zaista ogroman. Ona se tiče i domaćih organizacija, tiče se i umnogome međunarodnih organizacija. Dakle, mi ćemo se truditi da se usmerimo ka srodnim udruženjima, a onda i međunarodnim organizacijama koje nemaju samo direktno obrazovanje odraslih u programu i samo članstvo ovog tipa, već i ka onima koji programima dotiču našu oblast ili doprinose kako razvoju istraživanja, tako i razvoju profesije.

N. Koruga: *Jedna od završnih faza profesionalizacije jeste donošenje etičkog kodeksa profesije. DaS je već počeo da rešava to pitanje. Na čemu još trenutno radite?*

V. Orlović: Zaista smo rešavali mnoga pitanja od poslednjeg Andragoškog dana do danas i bilo je dosta posla. Što se tiče rada na kodeksu tada smo definisali grupe, odnosno timove ljudi koji bi se po poglavljima bavili tom tematikom. Kodeks će verovatno biti spreman za sledeći Andragoški dan, ali ne smem to da obećam, pošto se svi volonterski angažujemo. Pored toga bih istakla da će DaS u junu biti koorganizator Konferencije o evaluaciji o obrazovanju u balkanskim zemljama, zatim ćemo organizovati sledeći Andragoški dan u novembru 2011. godine. Osim toga svi radimo, mislim na Upravni odbor, na prepoznavanju mogućnosti koji projekti i izvori sredstava bi mogli da pomognu rad udruženja u narednoj godini. Dakle, ispitujemo i mogućnosti što se tiče Ministarstva nauke i gde se sve treba registrovati i prijaviti kako bismo otvorili prostor za pribavljanje sredstava u budućnosti.

N. Koruga: *Možete li mi opisati strukturu DaS-a?*

V. Orlović: Dakle, članovi će preko skupštine moći da odlučuju, odnosno da daju svoje mišljenje o programu rada, moći će da potvrde ili biraju novi upravni odbor. To su tela koja su značajna za rad DaS-a. Članovi će takođe moći da učestvuju u oblikovanju samog programa i tokom godine, moći će da učestvuju u

razmeni informacija i svemu onome što Društvo bude razvijalo. Inače, poslednjeg Andragoškog dana formiran je upravni odbor koji će delovati makar do skupštine krajem godine. Ako ga skupština potvrdi nastaviće sa radom. Trenutno je nas sedam u upravnom odboru i moram da kažem da je sastav takav da su ljudi iz različitih oblasti rada i da imamo zastupljen i privatni i nevladin sektor i akademiju i sindikat i mislim da je to dobra osnova za rad i da svi sa velikim entuzijazmom i profesionalnošću pristupamo tom poslu. Članovi će moći direktno da utiču na program i izaberu oblasti u kojima će se najviše raditi.

N. Koruga: Ako posmatrate DaS kao simbol, šta za vas on znači?

V. Orlović: Moja prva asocijacija se odnosi na logo koji smo probali da izaberemo ovih dana. Većim delom smo došli do ideje koja u svakom slučaju uključuje pojedinca podržanog znanjima. Mislim da je podrška ta glavna reč koja simbolizuje DaS. Dakle, podrška članovima da se bolje međusobno povezuju, da se bolje bore za svoj status i podrška andragogiji kao nauci da nam još bolje pruži osnovu za tu dalju borbu i praktično definisanje.

N. Koruga: Kako biste opisali DaS za dvadeset godina?

V. Orlović: Kao jako profesionalno udruženje koje je doprinelo da kada se kaže andragog u ovoj zemlji sve bude jasno, kao nekoga ko je uspeo da doprinese implementaciji zakona, kao nekoga ko je doprineo verovatno i osnivanju novih andragoških institucija, možda čak i andragoškog centra i konačno nekoga ko je proširio svoje članstvo i ko ima razvijenu međunarodnu saradnju.

Prikaz knjige: Miomir Despotović, Razvoj kurikuluma u stručnom obrazovanju: pristup usmeren na kompetencije

U izdanju Instituta za pedagogiju i andragogiju Filozofskog fakulteta u Beogradu objavljena je monografija prof. dr Miomira Despotovića *Razvoj kurikuluma u stručnom obrazovanju: pristup usmeren na kompetencije*. Monografija sadrži 266 strana osnovnog teksta i 34 strane priloga u obliku relevantne literature (sa 250 bibliografskih jedinica), indeksa pojmova, indeksa imena i rezimea na engleskom jeziku. Autor se u ovoj nadasve kompetentnoj i odlično argumentovanoj studiji bavi aktuelnim problemom usklađivanja zahteva rada i efekata obrazovanja i učenja (u širem smislu); odnosno pitanjem o ulozi i značaju kurikuluma, posebno o razvoju kurikuluma u stručnom obrazovanju (u užem smislu). Na ovaj način monografija pruža čitaocima sveobuhvatni uvid u ključna *teorijska znanja* u vezi sa kurikulumom, ali i veoma precizne *praktične smernice* za oblikovanje kurikuluma u stručnom obrazovanju, koje su od izuzetnog značaja svima koji se neposredno ili posredno bave naučnim i profesionalnim pitanjima obrazovanja i učenja.

Aktuelnost teme kojom se Despotović bavi proističe iz savremenih potreba sveta rada i zahteva koji se stavljaju pred sistem (stručnog) obrazovanja, a tiču se dominantne potrebe za njihovim usklađivanjem. To znači da obrazovanje treba da pruži takva znanja, veštine i kompetencije koje će omogućiti mobilnu, fleksibilnu, visoko-produktivnu i zapošljivu radnu snagu (naglasak nije više na pronalaženju jednog zaposlenja, već na razvoju zapošljivosti – odnosno stalnoj konkurentnosti pojedinca na tržištu rada) kao političkog, ekonomskog i obrazovnog imperativa današnjice. Ove ciljeve moguće je postići upravo pristupom u razvoju kurikuluma koji je usmeren na sticanje kompetencija.

U ovoj visokostručnoj i retko temeljnoj monografiji sa detaljno obrađenim svim bitnim aspektima koji se neposredno tiču glavne teme, nalazi se i rečnik osnovnih pojmova koji je od neprocenjivog značaja za čitaoca – bez obzira da li gradi pristupa kao andragog ili kao stručnjak iz neke od drugih naučnih oblasti, kao teoretičar ili praktičar, kao profesor ili student.

Sama struktura monografije u potpunosti odgovara postavljenom cilju ili svrsi koju ova studija ima – a to je da, kao prvo, obezbedi neophodan uvid u različita teorijska razmatranja koja se tiču kurikuluma; zatim da, kao drugo, objasni sam koncept kompetencija, kao suštinskog pojma koji je u osnovi problema kojim se studija bavi; i kao treće da obezbedi sve relevantne podatke u vezi sa praktičnom primenom stečenih znanja o kurikulumu, odnosno da odgovori na veoma konkretno pitanje značajno za praksu obrazovanja i učenja, a to je: kako se odvija proces razvoja kurikuluma u stručnom obrazovanju?

Studija *Razvoj kurikuluma u stručnom obrazovanju: pristup usmeren na kompetencije* sadrži tri obimne i logički strukturirane tematske celine: 1) teorijska poimanja kurikuluma, 2) koncept kompetencija u stručnom obrazovanju i 3) procesi razvoja kurikuluma u stručnom obrazovanju.

U prvom, prvenstveno teorijskom delu studije, razmatraju se različita značenja kurikuluma, predstavljaju se pristupi u konceptualizaciji kurikuluma, analiziraju određeni odabrani modeli u razvoju kurikuluma i objašnjava se odnos i međuzavisnost kurikuluma i nastave. Počevši od etimologije reči kurikulum, Despotović nam već na samom početku ukazuje na nepobitnu činjenicu da je pred nama celovita andragoška studija u kojoj se odgovorno i argumentovano analiziraju svi bitni činiooci u razvoju kurikuluma. Sam termin kurikulum izvorno se odnosio na trčanje, trku, trkalište; značenje ovog termina bilo je određeno parametrima kao što su vreme, putanja, pravila, norme i kriterijumi. Prenesen na područje obrazovanja i učenja, termin kurikulum je u svom prvobitnom obliku označavao tok i redosled učenja, seriju prepreka i prepona (predmeta) u učenju koje treba savladati u toku određenog vremena. Kroz istoriju se pojmu kurikulumu sadržaj proširivao, a značenje menjalo. Slična situacija prisutna je i na polju pokušaja njegovog definisanja. Despotović navodi da se ove razlike u razumevanju i definisanju kurikuluma (posebno u toku 20. veka) ispoljavaju kao razlike u filozofskim pristupima i shvatanju karaktera i funkcije obrazovanja i učenja. Analizom relevantne literature izdvajaju se četiri najčešće grupe shvatanja kurikuluma. Prema ovim koncepcijama kurikulum se shvata kao: sadržaj učenja, produkt učenja, plan učenja i iskustvo učenja.

Neposredno nakon opsežnog i teorijski odlično potkrepljenog razmatranja u vezi sa različitim shvatanjem kurikuluma, Despotović nas veoma vešto uvodi u oblast koja se tiče pregleda različitih modela razvoja kurikuluma. Svoje izlaganje započinje objašnjenjem samog pojma modela i nagoveštava čitaocu da će se ovde susresti sa modelima koji su po svojoj prirodi teorijske konstrukcije i projekcije (i u većoj meri preskriptivni), ali i sa drugom vrstom modela koji su po prirodi projektne konstrukcije i akcije (deskriptivni). Sa andragoškog stanovišta, značaj analize datih modela razvoja kurikuluma je višestruk – ovi modeli omogućuju

istorijski uvid u razvoj teorije kurikuluma, čine kompleksne, relativno celovite predloge za obrazovnu praksu (odnosno njenog dela koji se tiče uspostavljanja osnovne strukture kurikuluma) i uopšte gledano nude stavove i ideje univerzalne teorijske, ali i praktične vrednosti za razvoj kurikuluma u stručnom obrazovanju i obuci različitih uzrasnih kategorija stanovništva.

Sintezom relevantnih teorija i modela, autor određuje kurikulum kao sistematski i strukturiran okvir kojim se definišu: svrha i ciljevi učenja, ishodi učenja, sadržaji učenja, organizacija, aktivnosti i sredstva učenja i kriterijumi i načini vrednovanja postignuća. Ovo određenje, ali i eksplicitno iskazan stav da je kurikulum *output* sistema i procesa razvoja kurikuluma i *input* u sistem nastave, autor detaljnije obrazlaže u kritičkom pogledu na odnos nastave i kurikuluma. Iz ugla andragoga, posebno je vredno zapažanje da se u učenju odraslih između planiranih i ostvarenih efekata učenja ne može staviti znak jednakosti.

Drugi tematski blok studije čini iz naučnog ugla bogata i plodonosna rasprava o konceptu kompetencija u stručnom obrazovanju. S obzirom na već demonstriranu temeljnost u pristupu problemima kojima se bavi, Despotović u ovom delu nastoji da čitaocu pruži potpuni uvid i razumevanje stručnog obrazovanja i koncepta kompetencija koji je u njegovom središtu. Funkcije i ciljevi stručnog obrazovanja posmatraju se iz istorijske, teorijske i praktične perspektive. Usled kontinuiranih socijalno-ekonomskih i tehnoloških promena opšti ciljevi, ali i određenja stručnog obrazovanja vide se kao promenljiva kategorija. Tradicionalno, stručno obrazovanje podrazumevalo je osposobljavanje pojedinca za obavljanje određenog posla ili zanimanja. Postepeno se u definisanju ovog vida obrazovanja akcenat pomerao na mogućnost upotrebe stečenih znanja i veština, odnosno na mogućnost zaposlenja (*employment*), viđenog kroz prizmu socijalnih i individualnih posledica stručnog obrazovanja i obuke. Savremena organizacija rada koju karakteriše smanjenje broja stalno zaposlenih i proporcionalni rast osoba sa fleksibilnim zaposlenjem nametnula je novi cilj stručnom obrazovanju – a to je zapošljivost (*employability*). Despotović objašnjava koncept zapošljivosti definišući ga kao stalnu konkurentnost pojedinca na tržištu rada.

Komparacijom savremenih sistema stručnog obrazovanja autor ističe nekoliko osnovnih karakteristika ovih sistema: a) zasnovanost na potrebama tržišta rada, b) uvođenje sistema (nacionalne) stručne kvalifikacije, c) formiranje širih profila zanimanja, d) partnerski odnos, e) integrisanost generičkih veština u strukturu kurikuluma, f) kriterijum uspešnosti je radna efikasnost, g) usmerenost na perspektivne potrebe, h) usmerenost na ishode u vidu kompetencija i i) modularna programska struktura. Svaka od navedenih karakteristika detaljnije je objašnjena i potkrepljena relevantnim podacima iz teorije i prakse stručnog obrazovanja i obuke u različitim zemljama, jer samo kroz sagledavanje modernih

stremljenja u stručnom obrazovanju i obuci možemo donekle predvideti njihov dalji razvoj.

Nakon odličnog uvida u savremenu potrebu za usklađivanjem rada i obrazovanja, Despotović čitaoca sigurnim koracima vodi nazad kroz istoriju i upozna je sa bazičnim pretpostavkama razvoja obrazovanja usmerenog na razvoj kompetencija (*competency based education*). Obrazovanje zasnovano na kompetencijama neposredni je proizvod industrijske revolucije, tačnije potrebe za maksimalizacijom radnog učinka i povećanja nivoa produktivnosti zaposlenih čije korene nalazimo kod F. V. Tejlora. Neoliberalna ekonomija, posebno spajanje tržišnih reformi sa teorijom ljudskog kapitala, čini drugi značajni konstituent koncepta obrazovanja usmerenog na sticanje kompetencija. Treći činilac jeste bihejvioristički pokret i njegove implikacije na područje obrazovanja i učenja, a koji je delovao istovremeno kao odgovor i podsticaj ovog vida obrazovanja. Ovime autor u potpunosti uspeva u svom nesebičnom naporu da čitaocu obezbedi potpuno razumevanje savremenog stanja i istorijskog razvoja obrazovanja usmerenog na kompetencije, što kasnije u studiji proširuje stručnom i odlično potkrepljenom raspravom o njegovom značenju i karakteristikama.

Deo monografije posvećen konceptu kompetencija i stručnom obrazovanju Despotović zaokružuje analizom značenja pojmova kompetencije i kompetentnosti, komparacijom različitih pristupa u njihovom definisanju i uvidom u integralni pristup problematici kompetencija i procesom njihove konverzije u standarde i kvalifikacije. Posmatrajući ih iz perspektive razvoja kurikuluma u stručnom obrazovanju, autor određuje pojam stručne kompetencije kao sposobnost da se prema prethodno definisanom standardu ili očekivanju obave kompleksne radne uloge, funkcije i dužnosti u čijoj se osnovi nalaze specifična znanja i veštine, stavovi i vrednosti. Standarde kompetencija čije se postignuće verifikuje kroz rigorozan sistem provere i ocenjivanja, autor određuje kao kvalifikaciju. Imajući u vidu stručni konsenzus i sistem provere i ocenjivanja kao ključne mehanizme konverzije kompetencija u standarde i kvalifikacije, Despotović ističe da za razvoj kurikuluma u stručnom obrazovanju odgovornost nije samo na obrazovnim institucijama, već je neophodno obezbediti podršku sveta rada u čijem je i interesu produkcija kadrova koji ne samo što znaju šta treba da se radi, već su u stanju da to zaista i urade.

U trećem i najobimnijem tematskom bloku autor je svoje istraživačke napore fokusirao na razmatranje osnovnih procesa razvoja kurikuluma u stručnom obrazovanju. Ističe da se identifikovanje i definisanje osnovnih strukturalnih elemenata kurikuluma u stručnom obrazovanju odvijaju u okviru četiri paralelna i međuzavisna procesa: specifikacija rada (podrazumeva identifikaciju konteksta rada i zahtevanih kompetencija), specifikacija učenja (znanje, veštine i stavovi

potrebni za obavljanje posla, odnosno ciljevi, ishodi, sadržaji i strategije učenja), specifikacija uslova učenja (materijalno-tehnički uslovi), specifikacija evaluacije i ocenjivanja postignuća (odnosi se na preciziranje kriterijuma i procesa vrednovanja). Kurikulum je u okviru ove šeme krajnji produkt i specifikacija učenja, odnosno on predstavlja svojevrstni plan učenja. Centralnu poziciju u ovako shvaćenom kurikulumu imaju ishodi učenja. Upravo ovde možemo da razumemo i zašto Despotović zastupa vodeću tezu da je koncept obrazovanja zasnovanog na ishodima najadekvatniji oblik teorijske elaboracije i praktične realizacije pomenute specifikacije učenja.

Prilikom polemike o uslovima razvoja obrazovanja zasnovanog na ishodima posebna pažnja posvećena je razumevanju doprinosa bihejviorističke psihologije, u čijem je okviru nastala njegoa početna teorijska elaboracija. Pregledom stručne literature i kritičkom osvrtu na mnoštvo različitih interpretacija obrazovanja zasnovanog na ishodima, Despotoviću nije promaklo da se ono često definiše kao filozofija, teorija i/ili princip organizacije obrazovanja, model, strategija i metod nastave i učenja, zatim kao pristup planiranju i razvoju kurikuluma, ili kao specifična institucionalna organizacija i praksa obrazovanja. Pod obrazovanjem zasnovanim na ishodima u ovoj studiji podrazumeva se sveobuhvatan pristup organizaciji obrazovanja čija je osnovna karakteristika: a) potpuna usmerenost svih komponenta procesa obrazovanja na krajnje razvojne kvalitete (ishode) koje treba postići i u kome b) krajnji razvojni kvaliteti usmeravaju i kontrolišu celokupnu strukturu organizovanog procesa učenja – planiranje i razvoj kurikuluma, organizaciju i realizaciju nastave, evaluaciju i ocenjivanje.

Gledajući na ishode učenja kao eksplicitne iskaze o rezultatu učenja, autor veoma spretno pojašnjava da ishodi u tom smislu opisuju osobu koja uči posle definisanog perioda učenja i kazuju nam šta osoba zna (razume), šta je u stanju da uradi pod određenim okolnostima i kako se ponaša u odnosu na ono što radi (iskaz o stavovima, vrednostima i orijentacijama). Temeljno razmatranje ishoda obrazovanja i učenja prošireno je polemikom o njihovoj strukturi, pojmu, vrstama i formulacijama, te zaokruženo veoma zahtevnom ali i te kako potrebnom i korisnom ukazivanju na razlike između ishoda, ciljeva i zadataka.

Imajući u vidu sadržajnost i obim informacija u vezi sa svakim od procesa u razvoju kurikuluma, čitalac može s pravom da očekuje i detaljniji uvid u oblast koja se tiče procene u obrazovanju. Svakako neće biti razočaran – jer će ovde naći sve podatke u vezi sa različitim određenjima, vrstama i osobenostima evaluacije u obrazovanju, zatim značajne informacije koje se tiču njenog pojma, strukture i područja i dimenzija njene realizacije. Posebno se razmatraju modeli evaluacije kurikuluma i standardi ocenjivanja postignuća. Specifikaciju evaluacije i ocenjivanja autor određuje kao proces identifikovanja ciljeva, procedura i kriterijuma

vrednovanja aktivnosti i rezultata aktivnosti u procesu nastave i učenja, a njen krajnji produkt jeste standard evaluacije i ocenjivanja.

Ukoliko se i desi da ponekom od nepažljivih čitalaca promakne neko od određenja glavnih termina u okviru studije ili ima potrebu za njihovim ponovnim pregledom i analizom, na samom kraju knjige nalazi se izvrstan rečnik u kom su eksplicitno definisani svi važniji pojmovi obuhvaćeni studijom *Razvoj kurikuluma u stručnom obrazovanju: pristup usmeren na kompetencije*.

Ovim radom Despotović je potvrdio svoj osobeni pristup problemima koji podrazumeva temeljnost pri istraživanju građe, stručnu potkovanost u analizi i razumevanju pojmova, sposobnost kritičkog sagledavanja različitih pristupa i veštinu jasnog i preciznog raščlanjenja svake od pojmovnih kategorija kojih se u svom radu dotakne. Najnovija knjiga Despotovića predstavlja jedinstvenu i koherentnu studiju posvećenu osnovnim problemima razvoja kurikuluma u stručnom obrazovanju, a bogato iskustvo autora koji temi prilazi temeljno i znalački čine ovu studiju nezaobilaznim izvorom znanja za svakog naučnika koji se bavi ovom oblašću.

Kristina Pekeč

Information on Adult Education in Europe: InfoLetter¹

Christina Gerlach, InfoLetter, No 6, 2010

FINANCING ADULT EDUCATION IN TIMES OF CRISIS AND THE NEED FOR INNOVATIVE CONCEPTS

All over Europe, almost all sectors are very strongly affected by the economic crisis and are still trying to regain stability. The field of education depends mostly on national funding that often has been cut due to the crisis. Against this background alternative sources of finance have to be found.

This problem was dealt with in an expert workshop in Brussels organised by the Directorate General Education and Culture. The workshop took place from 18th to 19th October and discussed ways of financing adult education in times of crisis – a topic that is relevant for the education sector in every Member State. The event brought together experts from the education sector, representatives of national governments responsible for education and experts from the financial sector.

In order to discuss ways of financing adult education underlying problems soon became clear: First of all the empirical evidence for costs and benefits of adult education is limited though financing adult education as a political question has to be based on reliable data and statistics on the outcomes of adult education in the different Member States. While the necessity of financing early education is hardly discussed, the benefits of adult education remain nebulous. Which are the costs for different levels of education, especially adult education? Which are the rates of return for financing adult education and could short-term benefits from adult education contribute to the long-term investment in early education?

¹ Information on Adult Education in Europe – InfoLetter je elektronski informativni servis evropske mreže „European InfoNet in Adult Education” koja je nastala u okviru Grundvig Programa za celoživotno obrazovanje Evropske komisije. InfoLetter izlazi dva puta mesečno i pruža informacije o obrazovanju odraslih u zemljama Evropske unije.

Beside the individual effect of adult education further positive results such as fiscal returns or social insurance contributions could be reviewed. Not to mention the risks of serious political problems resulting from failed formal education and training.

The central question of the discussion was who pays or should pay for adult education? Different national ways of dealing with this question were presented and analysed among them possibilities of self-financing, publicly financed and employer financed adult education. Currently training vouchers and learning account are the most applied instruments, in addition training loans, tax subsidies, savings plans or learning time accounts are used to finance adult education in different EU member states.

The discussion focussed on giving background data concerning European trends in adult education and tried to analyse their implication. Experts from different Member States described their experiences with financing instruments for adult education and make a contribution to the developments of concrete recommendations for policy and research. Little reliable information is available on effective financing of education on different administrative levels and by different sectors. In addition, the outcomes and efficiency of the sector remain hard to quantify.

The question of financing adult education was also discussed in the context of the Action Plan on Adult Learning: The DG is currently working on the way forward for the Action Plan on Adult Education that has been launched in 2008. The action plans aims at improving the quality and the efficiency of the adult education sector and ensuring an adequate investment in the adult learning sector. If the follow-up of the action plan shall comprise a concrete roadmap it has to be based on reliable data and statistics on adult education in Europe.

Marta Ferreira, Head of Unit for adult education stressed the importance of discussing financing opportunities for education as many governments tend to cut funding from the education sector facing the pressure of the financial crisis without considering the negative impacts and additional costs that will be caused by this. She pointed out that a coherent strategy for lifelong learning has to comprise the whole system from early to adult education. Although the results after ten years of Grundtvig are basically positive, the financial crisis and the difficulties of public funds imply negative impacts for the future of Grundtvig. Marta Ferreira asked to consider the involvement of private funds and other resources and to put forces together to ensure the future of adult education in Europe. However, more innovative concepts for financing adult education have to be established.

The EU Parliament – Politics, Policy and People Magazine

Meri Hanibol, *The Parliament*, No 323, 2011

OBRAZOVANJE, OBRAZOVANJE, OBRAZOVANJE

Od društvenih promena do rodne ravnopravnosti, od svesti o različitim kulturama do ličnog ispunjenja, Meri Hanibol smatra da celoživotno učenje može da doprinese dugoročnoj dobiti društva

Pojam celoživotnog učenja na prvi pogled može zvučati čudno. Daljim bavljenjem njime postaje jasno na koji način ono može obogatiti ljudske živote ili im pomoći da dostignu ambicije vezane za karijeru o kojima su oduvek sanjali ali za koje su mislili da neće moći da ih ostvare. Postoji potreba za investicijama u resurse i strukture koje podržavaju koncept celoživotnog učenja. Evropska unija je učinila dosta napora da podstakne ovaj koncept kroz Grundtvig program koji je opisan kao „praktično učenje za odrasle“.

Grundtvig program koji je otvoren od 2000. godine bavi se potrebama za podučavanjem i učenjem onih koji pohađaju kurseve za odrasle i kurseve „alternativnog“ obrazovanja. Njegov cilj je razvijanje sektora za obrazovanje odraslih kao i da omogući da što više ljudi prođe kroz iskustvo učenja posebno u drugim evropskim zemljama. One zemlje koje prihvataju ideju celoživotnog učenja imaju veću participaciju u obrazovanju. Studija koju je radio Tom Šiler (Tom Schiller) i Dejvid Votson (David Watson) pokazuje da Velika Britanija ima dobru poziciju kada je u pitanju usvajanje programa celoživotnog učenja u odnosu na druge zemlje zato što su njeni programi u formalnom obrazovanju fleksibilni.

U suštini, celoživotno učenje je dobro za one koji žele da steknu nove vštine. Međutim, ono ima i dalekosežniji uticaj koji takođe uključuje sreću, opštu društvenu koheziju i inkluziju. Ovo ne znači da nema problema sa time koga celoživotno učenje uključuje. Najveći od svih izazova je pitanje demografije i ravnopravnih mogućnosti za sve. Celoživotno učenje se najviše fokusira i najviše novca troši na nastavak obrazovanja osoba od 18 do 25 godina. Ovo je nešto čime se moramo baviti.

Međutim, ne obogaćuju naše živote samo programi u formalnom obrazovanju – programi u neformalnom sistemu takođe imaju važnu ulogu. Istraživanje koje su sproveli finski naučnici koji su proučavali ideju neformalnog učenja u Finskoj došli su do nestalnih rezultata.

Ovo istraživanje pokazalo je da je oko 50% odraslih u Finskoj na neki način učestvovalo u obrazovanju odraslih u 2006. godini. Istraživanje je pokazalo da želja za učenjem nije toliko bila vezana za mogućnosti razvoja karijere već da je mnogo veća motivacija bila entuzijazam i želja za nastavkom učenja.

Evropska komisija pominje celoživotno učenje u strategiji EU 2020, a statistike pokazuju da oko 80 miliona ljudi imaju slabe ili bazične veštine ali da dobrobit od celoživotnog učenja uglavnom imaju oni sa višim nivoom obrazovanja. Komisija veruje da će do 2020. godine 16 miliona poslova zahtevati visoke kvalifikacije dok će potražnja za slabim veštinama opasti za 12 miliona radnih mesta. Dostizanje dužeg radnog veka takođe zahteva mogućnost za sticanje i razvoj novih veština tokom celog života.

Tačno je da je celoživotno učenje dobro za lično ispunjenje, ali ono takođe može imati dugoročniji efekat na društvo i može da dovede do društvene promene i aktivnog građanstva, rodne ravnopravnosti i svesti o različitim kulturama. Ovo su sve pozitivni ishodi koje Komisija za kulturu veoma podržava.

Prevela Marijana Todorović

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