

Institutional perspectives on lifelong learning: Evidence from Romania and Hungary

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Romania and Hungary are among the countries with the lowest participation in lifelong learning among the European Union Member States. Many studies among them many funded from EU funds have been dedicated to the analysis of the system-level conditions leading to low participation. The institutional perspective is less explored which leads to the experience of LLL providers to be less heard. This article investigates the institutional level of LLL with a focus on universities and the non-degree programs available to non-traditional students in both Romania and Hungary. The findings show that the needed and suitable legal and policy framework is in place in both countries and that numerous non-degree types of programs are available at all four universities included as case-studies. Nevertheless, the lack of funding and prestige associated with non-degree programs, together with limited infrastructure are major causes for the limited number of students enrolled in these types of programs and their failure to reach a wider section of society. National differences such as the lack of coordination between ministries and agencies working on LLL (in the case of Romania) and the changes in the funding system affecting particularly social sciences and humanities (in Hungary) are also inhibiting factors for the increased participation in lifelong learning.

Keywords: lifelong learning, institutional perspective, Hungary, Romania, comparative study

For almost two decades education ministers from European countries and beyond (currently 48 signatories) have agreed on and implemented the so-called 'Bologna process', a wide-ranging framework for the reform and harmonization of higher education. An important step was made in 2000 when building on the experiences from the European Year of Lifelong Learning (1996) and numerous national initiatives, a Memorandum for Lifelong Learning was adopted. Its purpose was to launch "a European-wide debate on a comprehensive strategy for implementing lifelong learning at individual and institutional levels, and in all spheres of public and private life".¹ In 2001 at the Lisbon summit the concept of lifelong learning was officially added as a goal of the process with a view of making European citizens better prepared for the 'knowledge society' and to keep its ageing workforce productive.

Although countless transnational and national policy documents refer to lifelong learning (LLL), the term had varied in meaning since it was introduced in EU policy language, and its interpretation also varied among Member States where various terms were used interchangeably (i.e.: LLL, continuous education, adult education). The EU started to distinguish between LLL and adult education around 2007, and adult learning was viewed as a distinct domain in LLL (Holford et. al 2014 and CEC 2007). In national documents, very often the term 'lifelong learning' is used interchangeably with 'permanent education', 'continuous education', and 'continuous formation' which may also demonstrate a sort of confusion (Popescu 2012).

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1. European Communities: A Memorandum on Lifelong Learning (2000) Received from: http://arhiv.acs.si/dokumenti/Memorandum_on_Lifelong_Learning.pdf, (2018. 09. 15)

Currently, the Commission is working with 32 countries to implement the European Agenda for Adult Learning and collects official statistics to monitor progress towards the goals of having an average of at least 15% of adults aged 25 to 64 years old participate in lifelong learning. (in 2016, the proportion of persons aged 25 to 64 in the EU-28 who participated in education or training was 10.8%).² There are significant differences among Member States in implementing LLL policies. Countries like Luxemburg and Netherlands are particularly successful and some of the more recent Member States particularly in Eastern Europe do less well (see Figure 1). While the reasons for the uneven development depend to a large extent on national conditions, Bengtsson (2013) argues that they probably fall in the following categories: the lack of workable implementation strategies, the lack of a funding system and stakeholders' resistance to change.

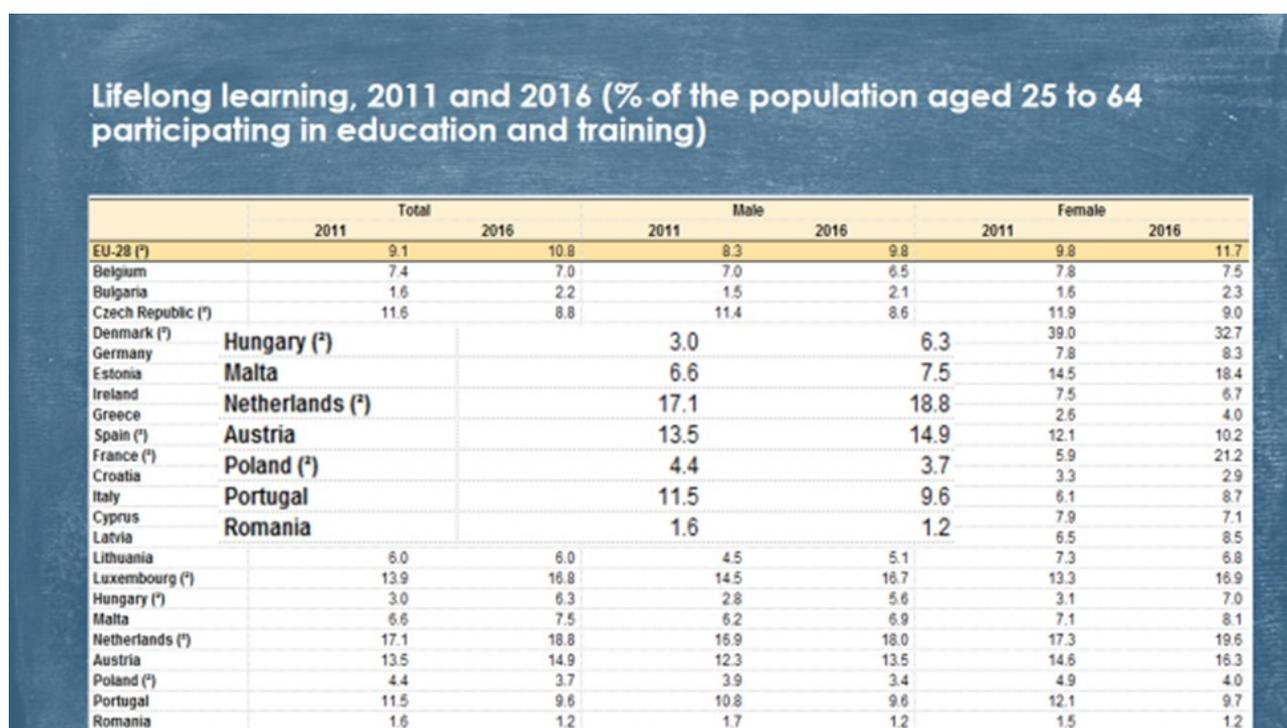


Figure 1 Eurostat source

Despite significant funding allocated through the European Cohesion Funds and technical assistance also provided, Romania and Hungary are both among the lowest performers together with Bulgaria and Poland. Since becoming EU Member States (2005 and 2007) both Hungary and Romania made significant progress in setting up the legal conditions for LLL. In Hungary, a LLL national strategy was initiated in 2006 and re-worked in 2013 through the Act LXXVII of 2013 on Adult Education regarding the requirements for the organization, content, quality assurance, implementation, licensing, monitoring, accreditation and electronic storage of information. The Law applies only to trainings for which the State undertakes special responsibility either by awarding a recognized qualification or by funding it (subsidized by national-EU funds). To increase transparency and promote attendance in LLL programs a National Training Register (Országos Képzési Jegyzék, OKJ) was set up listing all courses and programs that meet the requirements of *adult education*. At policy level,

2. https://ec.europa.eu/eurostat/statistics-explained/index.php/Adult_learning_statistics

the merge under the Ministry of Economy of several agencies with LLL related portfolios could also be a step towards better policy harmonization and cooperation between government units.

Romania's situation is somewhat different with an actual decrease in the adult participation in learning programs (25-64 years) from 2% in 2013 to 1.6% in 2016.³ The decrease happened despite significant measures being adopted (i.e.: the national *Report on the Implementation of the National Reform Program 2007-2010*). The Report addressed the issue of the low participation in continuous education and stressed the need to create lifelong learning structures and partnerships. In 2011, a Law of Education was passed reforming significantly the Romanian education at all levels and applying for the first time in binding documents the term of 'lifelong learning' (Popescu 2012) in a special section (Title V). Unlike Hungary, LLL-related portfolios are held by numerous bodies as shown by the article 335 in the 2011 Law: *The State shall exercise his powers in the field of lifelong learning through the Ministry of Education, Research, Youth and Sport, Parliament, Government, Ministry of Labor, Family and Social Protection, Ministry of Culture and National Heritage, Ministry of Health and the Ministry of Administration and of Home Affairs*. As several researchers have already shown (Popescu et al. 2011 and Popescu 2012) this constitutes a major challenge to LLL implementation which is often too fragmented between multiple agencies and ministries. On the positive side, in 2016 a comprehensive National Strategy for Lifelong Learning was adopted providing evidence-based measures to address low participation, including the introduction of a Registry of adult education courses similarly to the Hungarian OKJ.

Despite the significant changes in legal frameworks and the progress made in Hungary, both countries are still far from the average 10% participation across the EU Member States. Historically both Romania and Hungary share a communist past and institutions were shaped by communist policies. Their post-1989 path was somewhat different though. Szelényi and Wilk (2010) show that Hungary initially veered towards neoliberal policies while Romania embraced neo-patrimonial policies initially and changed course towards liberal policies a decade later. They also reveal that both countries are marked by profound inconsistencies between economic, political and welfare institutions (with higher education included here) which could be an explanation for the difficulties in running LLL programs that require cooperation between multiple state actors. Like Szelényi and Wilk's research, many other studies focus on the system level trying to describe and compare LLL policy and less its implementation. The view is mostly from the perspective of policy makers rather than that of LLL program providers.

Concerning Hungary, the most notable are the proceedings from the first conference of the MELLearn (2007) - Hungarian Universities' Lifelong Learning Network Association showing the incipient stage of policy implementation, the work of Balázs Németh on the organization of LLL and adult education in Hungary (Németh, 2014, 2017) and the comparative studies looking at various policy elements. Saar et al. (2014) revealed that Hungary was at the low end of diversification of formal education systems and could offer limited access for adults (they look at all access not just LLL) and Biagetti and Scicchitano (2013) discussed in details the determinants of lifelong learning incidence across European countries including Hungary. The institutional perspective is hardly discussed with a few exceptions such as Németh's (2014) article on the cooperation between the Institute of Adult Education and HRD of the University of Pécs and non-university partners, cultural organizations, museums, libraries, civic organizations and associations, and local and regional councils towards a regional and local LLL initiative.

3. https://ec.europa.eu/education/sites/education/files/monitor2017-factsheet-ro_en.pdf consulted May 14, 2018

With regard to Romania: Popescu (2012) offers an excellent analysis of the history of LLL in Europe and in the Romanian context and looks into the recent evolution of policy in the field pointing that in most LLL initiatives the emphasis is on the system and on the institutional structure not on the learners and their needs. Sava (2014) lists the structural challenges to LLL: limited infrastructure unsuitable for addressing a wider section of society, limited integrated local initiatives, and insufficient financial aid for learners and lack of awareness of the LLL benefits and available options. As shown by Popescu et al. (2011) an additional challenge is the lack of policy consistency and continuity due to Romania's political landscape being quite volatile. Additionally, there are studies revealing adult learners' perspective on the benefits of lifelong learning in European countries including Romania (Manninen et al. 2014), the accessibility of adult education to wide categories of beneficiaries (such as the 2014 World Bank discussing among others the low participation in LLL of Roma in comparison with non-Roma population or Robert et al. (2013) discussing unequal access to LLL in Hungary).

Nevertheless, while the legal and policy conditions for LLL are relatively well documented in both countries it is less clear what are the difficulties encountered by the programs providers. This paper sets out to address this gap in research by providing an analysis of LLL programs available at university level in both Romania and Hungary and to discuss the opportunities and challenges they encounter. As shown by Schuetze and Slowey (2000) in their studies conducted in 10 countries, the institutional factor is essential in adult participation in higher education, therefore we decided to focus on universities particularly because they have significant capacity to engage in LLL. Institutional perspectives are important in comparative studies because as noted by Saar et al. (2013) nation specific institutions and the way they are connecting with other institutions and organizations are crucial to explain differences in outcomes at a national level.

Currently, in Romania, universities are some of the least active actors in the field from among those more than 2000 registered LLL courses providers, despite having capacity and the prestige needed for LLL. Sava (2014b) shows that during the survey conducted in the framework of the *Benefits of Lifelong Learning in Europe - BeLL* project out of more than 1000 adult respondents involved in LLL only 20 mentioned they took courses provided by higher education institutions. The situation is not much different in Hungary where the majority of LLL are outside academia. Moreover, in view of the demographic changes and a decrease in number of students (particularly in Romania) as well as the policy talk about universities social mission and the duty to do more for their communities and their graduates, higher education institutions will be increasingly pressured to offer opportunities for non-traditional students.

Methodology

This paper explore a narrow section of life-long programs and focuses on non-degree (ND) courses offered at university level in two of the top five largest comprehensive (non-technical, medical or dedicated to arts education) universities both in Romania and Hungary. The research was conducted during 2017 and first part of 2018, and data was collected through the following channels: First, through publicly available documents including: strategic plans, strategies for university engagement, website information regarding non-degree courses at each university and the relevant entries in both national adult education registries about courses provided by universities. Second, sources included official European Union statistics and national data collected through projects funded by the EC during 2010-2015 such as multi-country BeLL project. Third, interviews with key informants in each university. In Hungary, data was collected through direct and skyped semi structured interviews with 3 faculty members from 3 separate departments, 1 head of unit responsible with non-

degree courses, and one senior university leader) while in Romania I interviewed directly 5 faculty from separate departments, the head of the LLL unit (with administrative duties), the provost in charge (among others) with LLL programs. In three cases follow up interviews were made with informants, in all cases via Skype/ phone with the purpose of making sense of the data collected on-line and to gather additional information. Additionally, in Romania, I interviewed a former Minister of Education, and the Presidential Counsellor for Education.

Findings

This section is structured in three parts: first the main type of non-degree programs will be outlined for both countries indicating the similarities and differences. Second and third sections will cover the challenges and opportunities for institutions in each country as understood from document analysis and interviews. In both countries, the studied universities' strategic plans included as objectives in the expansion of the non-degree (ND) programs and a closer collaboration with the local/regional community. In all cases, the strategies do not include a concrete and detailed plan for implementation of these particular points.

As initially expected, universities in both countries offer to a large extent the same type of non-degree programs:

- Professional development courses
- Mandatory reconversion courses for teachers
- Mandatory professional advancement courses for teachers
- Summer courses
- Skills building courses for students by students
- University entrance preparatory courses

In both countries, the *number of courses and students* is low compared to the students enrolled in degree courses and institutional teaching capacity. However, it is very difficult to have access to reliable statistics for several reasons: first, department and faculty fragmentation in both Romania and Hungary make it difficult even for the universities to know exactly how many participants in ND courses there have been (particularly in Romania key informants flagged this as a serious impediment to reliable data); additionally, while Hungarian universities need to report the number of courses and students enrolled in adult education programs to the relevant unit under the Ministry of Human Capacity this obligation does not exist for the programs that do not meet the requirements of *adult education* (for instance courses that do not offer a certificate or qualification). Nevertheless, all informants confirmed that the number of attendees for ND programs is quite low (in Romanian universities included in the study for instance in 2015/2016 they had 500 respectively 780 NDP participants in universities with more than 20000 degree students located in town with more than 200000 inhabitants).

In terms of *funding*, in both countries the majority of the ND courses are either entirely self-funded or sponsored by employers or public authorities. In Romania, both universities indicated that they signed partnerships with several local authorities for training of public servants (although these were often one-off trainings rather than longer term collaborations). In Hungary, the training of public servants has been largely taken by the recently established National University of Public Service (NUPS) which offers opportunities for executive education and continuing education to public servants.

The *procedure* to introduce new courses is quite complex in both countries, requiring approval at faculty and university Senate level and registration with the relevant national Ministries. In Romania, the informants noted that the average 2 months needed for the set-up of a new program is not particularly burdensome and the costs are accessible. The procedure was set up in Minister's order 5160/2015 and requires universities to submit the request to the National Qualifications Agency to be inscribed in the national registry and to the relevant unit of the Ministry of Education.

In Hungary, non-degree courses do not have to be accredited (like in the case of each and all degree programs) but they have to be registered at the Educational Office of the Ministry of National Resources, based on a supportive Senate-decision of the university. This registry is a condition of advertising the course with an outcome, like certification to be used in the labour market with credits, for example. Other general courses without any labour market reference do not have to be registered but shall have to be given permission from the Faculty it is being organised at.

Incentives for universities, faculties and departments to introduce ND courses are very limited in both countries and there are virtually no sanctions for departments or faculties who do not offer them. Funding for courses rarely comes from the government and funding has been one of the main reasons there is limited interest in LLL at universities in both countries. Financial considerations are an important factor in the Romanian context with the Vice-Rector of one the universities declaring that ND courses bring much needed additional income to departments and faculty. In Hungary, the added income brought through ND courses seem to be less compelling though it's not entirely clear the reason behind it. In addition to financial rewards, a key informant in Romania noted that professors that teach in ND programs are 'rewarded somewhat when it comes to promotion' but that there were no clear rules about it. In Hungary, the only significant reward seems to be the personal satisfaction of the faculty rather than the institutional recognition. Additionally, as noted by one of the Hungarian informants: *there is no professional prestige in teaching ND courses therefore not may professors choose to do.*

In terms of *existing capacity for ND programs* at university level the situation differs between the two countries. Official documents including the National Strategy and universities' strategic plans stress that higher education institutions need to look for non-traditional students to counteract three external factors: the dramatic decrease in student population in the past 10 years from a peak of approx. 900000 students in 2007 (both in private and public institutions) to about half in 2017 and the projection that the decline will continue due to demographic trends and emigration. This trend affected significantly more the private institutions which have been forced to shrink the size and number of their programs but it is likely to also affect more and more the state universities. In Hungary, these trends have been less severe but there the relatively recent policy changes favour institutions dedicated to vocational education and Science, Technology, Engineering and Mathematics (STEM) and are less favourable to social sciences and humanities in terms of funding. A key informant in Hungary noted the already diminished capacity for LLL in general in Hungarian higher education institutions explained as the limited expertise available to train providers of LLL. In his words "*the significant reduction in funding for social sciences and humanities will eventually lead to a lack of trained personnel in all fields including STEM. ...Higher education in general and LLL too cannot be done unless you invest in pedagogic training for those that will deliver trainings in all fields*". He continued that "*I personally worry that we will be left with no capacity whatsoever as specializing in pedagogy and topics like this that are less attractive and poorly paid will eventually lead to no capacity of universities to do adult education at any level, degree or non-degree.*"

Capacity is needed and lacking currently for managing ND programs. The manager of one Romanian Center for LLL belonging to one of the universities described that they do not have capacity to look for opportunities and to assess demand. Moreover, he mentioned that *“to look partners and clients for LLL programs requires different types of skills that your regular university job dealing with students. We could use some help with expertise and help in identifying demand from the Ministry if they want us to do LLL.”* This confirms not only Sava’s (2013) view that assessing demand is a major difficulty but also Robert et al.’s 2013 commentary about universities having to look at LLL from a market perspective that might be different from that they have towards degree programs.

Challenges and opportunities

Among the most important opportunities in both national context seems to be the availability of legal and policy framework required for LLL provision, their location in large cities or regions, the ‘institutional privilege’ (understood as a long history and prestige)⁴ many universities hold over other LLL providers in terms of prestige and advertisement opportunities through their alumni networks and circles. The university autonomy in both countries allows universities to set their own fees for ND programs unlike the fees for degree programs which in Hungary has been restricted for national and EU students enrolled on a fee-paying basis. Moreover, faculty autonomy in all institutions we studied makes it possible for individual departments and faculties to be more entrepreneurial in this regard and put forward ND courses if capacity is not lacking. Nevertheless, in the attempt to reach the target of 10% participation in LLL in both countries by 2020 the universities are well placed to contribute to teaching innovations and pedagogical support for other providers.

In terms of challenges many of them are common to the two countries: the lack of funding incentives to set up and manage LLL departments and to introduce new ND courses; the limited appointive and financial autonomy (making it difficult to hire and pay experts with competitive salaries); the very limited numbers of dedicated professional managers able to bring together multiple stakeholders and to forge partnerships beneficial for universities and clients (business, local and national authorities, etc.). Additionally, in both countries there is still limited awareness raising to benefits of LLL and to the existing educational offer on LLL. The steps towards increasing awareness including the set-up of National registries are important but there are still progress to be made including with regard to the quality assurance through students feedback (rating of courses is not available therefore other potential students cannot be informed about the quality of a given program).

National differences are relatively few despite the successes registered by Hungary and the decrease in participation in Romania. In Romania, the funding unpredictability of state bodies whose budget training is usually the most likely to be affected by budget rectifications was quoted as one of the most severe challenges. Additionally, employer financing of NDG is also limited, with only 25% of employers offering any training opportunities to their employees (by comparison in the Czech Republic the percentage is about 71% as shown by Popescu (2013). While most of these trainings are likely to be done in house, training providers (including universities) could also collaborate or share their expertise. The sharing of several agencies and ministries of LLL –related responsibilities was also pointed as a major impediment to the coherent implementation

4. EC (2008) Giving in evidence Fundraising from philanthropy in European universities, available at http://ec.europa.eu/euraxess/pdf/research_policies/Fundraising_from_Philanthropy_in_European_Universities.pdf

of the comprehensive National Strategy. Moreover, the long term political volatility in Romania was also pointed as a threat to policy implementation: the country had 26 Ministers of Education in the last 28 years and the 2011 Law was amended in 2014 when no less than 97 changes were made and is currently also under revision, a situation which is likely to create policy uncertainty.

By contrast, Hungary experienced a period of relative political stability in the last 8 years and has adopted a centralizing policy whereby all LLL activities are reunited under the Ministry of Human Capacity. While this study is too limited in scope to show these policies as being instrumental in the progress made in LLL implementation, we can safely say that political will and stability are important factors in this regard. Nevertheless, the capacity for delivering LLL programs (both as non-degree programs and for training other LLL providers) seems to be relatively limited in universities with potentially severe effects on the medium to long term. One of the Hungarian informants noted that *restricting funding for social sciences will have a boomerang effect with the result being that there will be few people left to train teachers of other more desirable disciplines like those in STEM.*

Finally, all informants in universities noted that it would be of help if the state agencies could play a larger role in funding LLL and also in intermediating demand and offer. Universities might have the capacity to offer certain ND courses, but they seem to struggle with anticipating demand and assessing market needs. As one Romanian informant put it: *the Ministry wants us to do it but we are new to this game and are not sure where to start or how better to employ our resources.*

Conclusions

Both Romania and Hungary took significant steps to increase LLL participation with a look to catching up with the EU states that are more advanced. However, the view from institutional level confirms Jakobi and Rusconi (2009) view that the Bologna process has mainly had an impact on the discussion regarding lifelong learning, not necessarily whether and how such policies and programs are implemented. The present research confirmed that at the level of higher education institutions NDG programs and activities are in place but they have a rather ad-hoc, opportunistic character rather than a systematic one both in Romania and in Hungary. Despite the rhetoric of catching up with the more advanced Members States in the field of LLL the reality in both Hungary and Romania seems to point to existing laws that are not implemented due to several factors. First, a lack of correspondence between the priorities of the education laws and the financial resources allotted to their attainment. Second, a lack of prestige for lifelong learning which is currently not addressed through the promotion of a lifelong learning culture and of information, counselling and professional guidance of learners of all ages and from all backgrounds. Third, institutional fragmentation at government level (in the case of Romania) and at university level (in both countries) has negative impact on coherent LLL programs in universities. Fourth, university autonomy seems to have an inhibitive effect on LLL with universities choosing to allocate institutional resources (funding and staff time) to teaching traditional students and research. Fifth, LLL strategies at all levels rarely have implementation plans with explicit measurable targets. Sixth, in terms of quality assurance, the effectiveness of ND programs at university level is seldom systematically monitored, and their performance is seldom evaluated. Seventh, all universities included in this study lack management capacity to offer ND programs on a more systematic base and in long-term cooperation with companies, local authorities and state bodies with activities portfolio encompassing LLL. Eighth and last, universities seem to struggle with an inevitable change in attitude towards ND clients for whom universities are only one of the program

providers and whom are not as compelled to undergo training as perhaps the regular degree students might be. This finding is in line with Jakobi and Rusconi (2009) view that “opening university studies to new and wider publics cannot be achieved unless higher education institutions themselves change – not only internally, but also in their relations with other ‘learning systems”.

To sum up, this study presented the existing non-degree programs available at university level in both Hungary and Romania and attempted to explain the low participation rates in LLL from the point of view of universities as providers of LLL programs. We have shown that while multiple challenges and opportunities are indeed similar there are several major differences. Most notably we have also shown the lack of policy implementation at institutional level and the rather ad-hoc and unsystematic character of many ND programs, with existing programs being the results of individual faculty agendas rather than part of a concerted effort. This finding contradicts the official stand on the push for LLL in both countries, while keeping in mind that universities although well suited to engage in LLL are only one of the providers.

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Az élethosszig tartó tanulás intézményi perspektívái: romániai és magyarországi példák

Románia és Magyarország az Európai Unió tagállamai között azok közé tartozik, ahol a legalacsonyabb az élethosszig tartó tanulásban való részvétel aránya. Számos tanulmány, köztük több, épp az Unió által támogatott rendszerszinten vizsgálja, milyen körülmények eredményezik ezt az alacsony arányt. Ezáltal azonban az intézményi nézőpont kevésbé kutatott, ami ahhoz vezet, hogy pont az élethosszig tartó tanulásban közreműködők tapasztalatai válnak kevésbé láthatóvá. A tanulmány ezért az élethosszig tartó tanulást intézményi szinten vizsgálja az egyetemekre és a nem-tradicionális felnőtt hallgatói csoportok számára hirdetett diplomát nem adó képzésekre fókuszálva Romániában és Magyarországon egyaránt. Ugyan az eredmények azt mutatják, hogy a szükséges és megfelelő jogi és politikai keretek mindkét országban adottak és számos diplomát nem adó képzés el is érhető az esettanulmányokban vizsgált mind a négy egyetemen, mindazonáltal e képzések támogatásának és megbecsültségének hiánya az infrastruktúra alacsonyabb színvonalával együtt alapvetően azt eredményezi, hogy csak korlátozott számú hallgató iratkozik be ezekre a képzésekre, illetve azok a társadalom szélesebb rétegei számára nem elérhetők. Az országok közti olyan különbségek, mint az érintett minisztériumok és más illetékes szervezetek közötti együttműködés hiánya (Románia esetében) vagy túlnyomó részben a társadalom- és bölcsészettudományok finanszírozásának átalakítása (Magyarországon) mind olyan gátló tényezők, amelyek az élethosszig tartó tanulásban való részvétel arányának csökkenéséhez vezetnek.

Kulcsszavak: élethosszig tartó tanulás, intézményi nézőpont, Magyarország, Románia, összehasonlító tanulmány