



SOCIOLOGY OF EDUCATION

Theories, communities, contexts

EDITED BY:
GABRIELLA PUSZTAI



Sociology of education

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Introduction

There are various international encyclopedias and handbooks on the sociology of education available to education researchers worldwide, encompassing an immense and irreproducible body of knowledge. However, education is as much embedded in a certain region's society as it is within global phenomena. This volume has been compiled by a group of education researchers, and aims to identify the most important factors affecting the processes of education, based on research on the social reality of the Central and Eastern European region. The chapters of this book are arranged into three thematic units.

Theories in the sociology of education

In this unit, we present some essential interpretational frameworks applied in various analyses in the field. Readers are given a multi-perspective introduction to mainstream theories, which are set against alternative interpretations and supplemented with novel approaches. The chapter *Interpretational paradigms of socialization at school* provides an overview of the reconstructionist and constructivist paradigms of socialization. The next chapter, *Forms of capital utilized in student careers*, addresses the educational implications of the concepts and laws of the theories of reproduction, human capital and cultural capital. The chapter *Rational choice theories and school careers* focuses on the possibilities (and limitations) of rational choices in school careers. The striking differences between girls' and boys' school performance have prompted the editors to include the concepts related to the comparison of the sexes in the chapter *Differences and competition: gender in education*. As the relatively new approach of resilience theories is revealing itself to be related to major questions within the sociology of education, we devoted a chapter to it titled *Resilience and compensating factors*.

Communities involved in education

The sociology of education focuses on the social mechanisms of education but, nevertheless, does not treat society as a distant or abstract entity.

Although the position of individuals can certainly be pinpointed in the structure of society, the input individuals are given during their education does not, in our opinion, come from the macro level. Instead, we believe it is more prominent from the level of communities. Society is generally defined as a network containing all social networks; a community is considered to comprise individuals whose interactions are shaped during shared activities and use of space.

Social sciences have reshaped the concept of community, which was previously limited by tradition and spatiality. Based on the intersubjective nature of knowledge, the core of its semantic field has come to include the joint construction of meaning by interconnected members, as well as the individual construction of the community's boundaries. The meaning of a locally rooted and well-defined community has widened considerably under the influence of Cohen's theory of the symbolic construction of community. In his view, a community is a network of people who are united by common goals and are, as a result, distinct from their environment. We are also of the opinion that education is most strongly influenced by shared interpretations within the community beyond the structural aspect of individuals connected through relationships. Education takes place when members of a community not only meet one another but also form social networks, the stability of which enables them to construct shared interpretations, which, in turn, have an impact on them.

Thus, the most important scenes of education are interpretive communities formed within relationship structures. The primary community is the family, which provides initial and formative socialization. Belonging to a national, linguistic or cultural community is also essential and highly relevant (and can be even more clearly recognized if the community in question is an ethnic minority). Religious socialization, regardless of its outcome, involves individuals whose world views, life goals and school careers are influenced by communities. Leisure activities pursued on one's own accord in voluntary organizations or sports clubs are also important factors of education. The media is continuously gaining ground as an educator. It does so by changing the unidirectional flow of information coming from organizational actors and by amplifying the educative effect of content through influencers who appear to be friends or peers and through groups that construct joint interpretations of messages. An increasing number of students, throughout their secondary school and university careers, are engaging in paid work. As such, the role of communities at work cannot go unnoticed. Finally,

teachers in school communities influence future generations not only as instructors but also as a professional community whose members are in day-to-day contact with young people and therefore their interactions also exert a significant influence.

The contexts of education

This unit assesses the contexts through which macro-level structures of reality appear in the process of education. Firstly, although time appears to be an objective factor, time management is a social phenomenon depending on age, gender, social strata and geographical position. Secondly, spatial location determines not only the culture acquired during education but also school career prospects. Regional differentiation leads to educational advantages and disadvantages, which greatly influence young people's academic advancement. Thirdly, generations growing up in pluralistic societies are faced with a diversity of values, which results in multiple interpretations of social reality. Schools also reflect this multitude of value preferences. Finally, we present the organizational context embodied in individuals' lives primarily by educational institutions. These organizations, along with the community of teachers and students belonging to them, are more than just the sum of individuals. Instead, they form a distinct part of the social context, the significance of which for education has only been discovered in recent decades.

This volume gives a comprehensive picture not only in terms of its subject matter but also with respect to the wide range of international literature referred to. Its use as a textbook at various levels of higher education is facilitated by definitions of the key concepts at the beginning of each chapter, as well as by a set of questions and tasks, in addition to recommended further reading at the end of each chapter. As is the case with all books, the full meaning of the words and sentences unfolds through readers' interpretations; therefore, all readers are kindly invited to join the interpretive community of the sociologists of education.

Gabriella Pusztai

**THEORIES IN THE SOCIOLOGY
OF EDUCATION**

GABRIELLA PUSZTAI

Interpretive paradigms of socialization at school

In the first chapter, we examine various interpretations of the concept of socialization as used by the sociology of education. First, we address the function of socialization; then we present a range of its alternative interpretations. The reconstructionist paradigm regards socialization as an involuntary act of copying patterns, whereas the constructivist paradigm postulates individuals' creative participation in the socialization process. Finally, we introduce the approach which is the closest to the perspective adopted by the sociology of education: individuals' socialization takes place while they are constructing reality together with their social networks.

Key Concepts

Socialization: Individuals' integration into society, the formal and informal internalization of social reality and culture through interactions.

Social learning: The acquisition of norms which are conveyed through interactions and which guide individuals. Social learning happens by imitating one's social environment and perceiving the sanctions during those interactions.

The reconstructionist approach to socialization: This approach emphasizes adaptation and conforming to the social context. The purpose of socialization is to transmit the status quo of culture and society in an unnoticeable manner.

The constructivist approach to socialization: Interpersonal processes are not unidirectional but reciprocal interactions, during which a collective cognition and construction of reality takes place. While adapting to the community, individuals take an active part in shaping its culture.

The critical approach to socialization: What happens during socialization in schools, which represent the culture of the ruling elite, is best described as acculturation through structures of power, the reproduction of social inequality, and the habitus created by families' social status.

THE TRANSMISSION OF A COMMUNITY'S CULTURE

Socialization is the transmission of the reality and culture of a society through formal and informal interactions (Hurrelmann & Ulich 1991; Sturman 1997; Hurrelmann et al. 2015). During their lives, individuals become members of several communities and, over the course of certain life stages, may leave their old communities and join new ones, which results in permanent socialization. This process consists of the repeated acquisition of new roles along with value preferences, behavior patterns, communicational and linguistic standards, as well as relationship patterns appropriate to an individual's position within a community.

This definition proposes that socialization happens through interactions rather than in a planned and organized way (as though it were assigned school material to be studied). The prerequisite for socialization is that individuals are capable of being in contact with their environment, developing from a biological being into a social one. The character of the child left in the wild without adequate opportunities to socialize has been depicted in works of fiction (Mowgli in *The Jungle Book*), illustrating the importance of socialization with literary tools.

However, individuals do not internalize the entire system of a society and culture but rather the behavior patterns – governed by norms – appropriate to their status and position. This can be accomplished with the help of role expectations, which are communicated by role partners, who also give guidance, set goals, and sanction behavior. Having processed the information gained through the observation of their social environment, individuals largely learn by imitating and following models. This is how Bandura (1989) defines social learning. If role expectations are unambiguous, individuals will acquire behavior models quickly and fulfill their roles successfully. Initial imitation will be replaced by identification with the role.

During the interactions with role partners, the key part is played by partners occupying complementary roles, as they can best communicate role expectations. Throughout the course of their personal lives and academic careers, such interactions prompt individuals to continuously reconstruct their readings of the roles suitable for their positions.

The diversity of culture, arising from demographic, social, educational, national, and religious divisions results in a variety of constructions of social reality. Accordingly, individuals do not internalize one single culture, position, or role during their lifetime. Instead, they assume a series of simultaneous or consecutive roles, which are constantly fluctuating

in response to their environment. Such an immensely dynamic process inevitably leads to constantly occurring role conflicts. A characteristic role conflict of socialization is the conflict experienced by individuals as members of different communities. For example, some dedicated teachers might be faced with the conflict between going camping with their classes and performing their duties at home as parents. Conflicts can also arise from different aspects of the same role. Teachers might be inclined to give slightly better grades to some of their students by way of encouragement, while they are expected to evaluate objectively as official agents of the education system. Finally, it is also possible that a conflict occurs between individuals' personal qualities and the roles they have, which would simply be referred to in everyday speech by saying that the person is not fit to be a teacher.

desocialization School careers may give rise to several role conflicts, since as one advances in the education system or perhaps switches institutions between certain levels, one is faced with different social realities and cultures in the new institution, and therefore has to assume new roles to succeed. A new role requires that the former one should be abandoned. In this sense, successful **desocialization** may also be considered significant by researchers. Desocialization: individuals, when losing touch with their communities, are no longer influenced by the communities' values and norms. Factors that can help desocialization include unambiguous and unanimous role expectations from role partners, the similarity of new role expectations to old ones, and strong control during the initial period. The process inevitably involves a degree of crisis because students go through separation from their former school communities, and transition and integration into new ones (Tinto 1993). Despite the separation, however, while reconstructing their roles, students preserve much of what they have acquired before, the recognition and successful handling of which is one of the greatest challenges teachers face.

resocialization Another related basic concept is **resocialization**, which denotes a radical break with former patterns of socialization and the adoption of new patterns at the same time. Some researchers claim that social reality leaves such a lasting imprint on children and young people that only an overwhelming outside force can bring about total transformation and compel individuals to "change worlds" (Berger & Luckmann 1966). However, some child welfare studies raise hope that resocialization is possible.

anticipatory socialization The concept of **anticipatory socialization** is also closely related to education. It refers to the internalization of the culture of a social group

before entering it. Preparation for a future student role often involves the preliminary acquisition of relevant behavior patterns. The condition of socialization prior to entering a higher level of education is that aspirants obtain information about the field they plan to enter, alleviating some of the pressure of transition. During the process, they can identify (to a certain extent) with the goals and the presumed or real culture of the institution, which manifest themselves in knowledge, norms, values, and attitudes (Sturman 1997). Students vary considerably regarding where they obtain that information, according to the composition of their social networks.

WHAT HAPPENS TO STUDENTS AT SCHOOL?

Socialization at school is such a complex and varied process that it is highly disputable whether it can be explored at all. Another extreme view is that students' socialization takes place according to a well-composed scenario of exerting impact by schools. As we can see, two distinct interpretations exist side-by-side.

What are the models that provide an **interpretive framework** to what really happens to students at school? Socialization at school can be studied from either a reconstructionist or a constructivist perspective (Musgrave 1988; Sturman 1997; Kiss 2008). The reconstructionist approach to socialization emphasizes adaptation and conforming to the social context. Therefore, educational institutions transmit the status quo of culture and society. Advocates of this view believe that while schools accomplish this strategic task, students involuntarily yield to the pressure of external, macro-level structures and follow the norm transmitted by schools according to plans. In contrast, the constructivist view holds that schools operate in such a way that participants take an active part in recreating the culture of the institution.

interpretive
framework

Each of the two approaches has two further variations depending on which specific features of the process they focus on, what they regard as the most important element and goal of student socialization, who they regard as its key agents, what they think the indicators of successful adaptation to school are, and how much significance they attach to role partners and the institutional setting. We have summarized the different theoretical approaches in Table 1. We intend to expand upon why we consider the last approach the most suitable for interpreting socialization at school.

THE STRUCTURALIST-FUNCTIONALIST MODEL OF SOCIALIZATION AT SCHOOL

serve social
integration

This model, created nearly half a century ago, is in line with the approach that the role of education, determined at the macro level, is to **serve social integration**, the cornerstone of which is the transmission of society's values, norms, and representations (Parsons et al. 1973). In this interpretation, education is a mission, based on the assumption that new generations entering society can be influenced in a planned, systematic way in order to be transformed into social beings. This is usually achieved successfully under the control of teachers and academic policymakers. The essential purpose of the exertion of institutional influence is to make students internalize the roles and norms that go with their position and to ensure that institutional sanctions exercise their formative influence. As a result, students adapt to the framework provided by the institution. Consequently, socialization is a linear process with a common outcome, in which the effect of the institution is intentional and unidirectional. The improvement of knowledge and skills, of moral and identity development, and of preparation for further study or a profession can be accurately planned in each stage (Weidman et al. 2001; Pusztai 2015). The most important features of this model are its teleological (heading towards an agreed-upon goal) character and belief in the intentional reconstruction and mass production of the student ideal. Socialization is considered successful if students can assimilate and have a positive attitude to the school environment. Some scholars call it the "switch-on" model, hinting at the passivity of the student role (Huber 1991). Passivity refers to the planned nature of student behavior: adapting to the available school structure and automatically taking in all the knowledge, skills, and values laid down in education policy guidelines and the curriculum.

voluntarist
approach

The **voluntarist approach** to student socialization has been widespread up to the present. It can be detected in education-related documents issued by Hungarian or international education and economic policymakers who view education from the perspective of macro-level trends. Furthermore, it is also present in novice teachers' attitudes insofar as they have a standardized and one-dimensional image of students and expect undifferentiated student behavior. The weakness of this model mainly lies in its simplification of institutional processes. Grounded in a rigid and normative conception, it does not facilitate the interpretation of disruptions and crises that might occur in the system, nor can it perceive

the wide range of differences between desired and actual outcomes produced by a highly heterogeneous student population.

THE CONFLICT THEORY MODEL OF SOCIALIZATION AT SCHOOL

Critical theories of socialization and the structuralist-functionalist model both presume that the basic structures of inequality, values, norms, and representations of society are transmitted during socialization. However, **critical theories**, including the theory of reproduction, bring to the forefront that, as social norms are determined by the dominant structures of power in society, it is also power structure, the reproduction of social inequality, and mechanisms of social selection that mainly underlie institutional socialization. Schools usually frustrate the ambitions of their low-status students with little cultural capital through the hidden curriculum, which contains norms and values transmitted in the social setting of the school. The aim is to make them realize that they are not suited for higher levels of education, which is reinforced by their grades, suggesting that they should give up their “illusory” dreams of social advancement (Reay et al. 2009).

critical theories

Bourdieu and Passeron (1977) use the term **acculturation** (rather than socialization) to describe the process whereby working- or middle- class students seem to acquire, albeit superficially, the linguistic-stylistic register, manner, and way of speaking and thinking which enables them to communicate with their teachers (Bourdieu & Passeron 1977). Teachers, by representing power and the elite, legitimize social inequality. This model regards socialization as the scene of the reproduction of social status and the reconstruction of the habitus formed by the family’s social status. The habitus which goes down in the family constitutes the deep structure that unnoticeably comes to the surface in everyday school activities, cultural achievement, setting learning goals, and developing aspirations. Originally internalized attitudes to knowledge gained at school, as well as one’s interests and taste, all comprise a disposition which exerts its influence unintentionally during one’s academic career. Habitus enters a dialogue with school culture, and socialization is successful if an encounter takes place between a high-status student and elite school culture (Willis 2000). In other words, this model views schools as institutions which represent high culture and aid students in becoming members of the social elite (Devlin & McKay 2014). If the habitus of a student’s family of origin agrees with

acculturation

the institutional habitus, institutions will decode membership of social class and acknowledge it as good taste and high-quality achievement. As for the acculturation of students with different habitus, the dominant culture imposes its patterns of power on the weaker side, and therefore low-status students will not fit into the system, feeling like “fish out of water” (Bourdieu & Passeron 1977). The reason for this failure is the disagreement between institutional and student habitus. The theory of social reproduction considers students as passive individuals who are determined by their social status and are incapable of social mobility because the power structure of society is reproduced unnoticeably at school through (institutional) habitus, which, according to Bourdieu, is the incorporated version of objective social structures. As it is the imprinting of the class system that takes place during socialization at school, structural pressure on students works efficiently. Regardless of curriculum content, nothing can override the effect of objective structures. Habitus activates expectations and practices which enable students to automatically decode messages about their aptitude or inaptitude and make them come to terms with the negative consequences. This advancement towards a purpose constitutes the characteristic teleology of this model. As student socialization in the education system is governed by dispositions determined by individual habitus, the result of the process will always be dependent on social class.

While in the structuralist-functionalist model, conformity is enforced by social norms and socialization agents in the school setting, the reproductionist model proposes that it is families’ social status that determines social norms, which cannot be altered by schools. In our view, the reproductionist model also simplifies the process of student socialization. The point that attracts the most criticism is that it excludes individual choices and reflective consciousness. Instead, since it considers the habitus imprinted in early childhood as an ingrained mode of action lacking conscious control, it counts on the influence of involuntary **determinism**.

Both models discussed so far presume, regardless of institutions, one uniform pattern of socialization at school and treat the student population as if it were the same in every institution, sector, and country and were only divided by vertical inequalities. Since these models regard institutional relations as reflections of the power structure of society, they claim that the habitus of each educational institution is uniformly determined by the mainstream cultural elite (which implies a similarly uniform image of teachers).

CONSTRUCTIVIST MODELS OF STUDENT SOCIALIZATION

Social constructivist and symbolic interactionist models, which have refined the structuralist-constructivist model, have drawn attention to the interpersonal nature of socialization and how various **constructions of reality** interact (Musgrave 1988; Berger & Luckmann 1966). Due to the experiences and mutual feedback between students and teachers who are involved in socialization, the process is not linear but circular. Additionally, this displays the influence of agents outside school. This is the basis of the collaborative model of socialization (Sturman 1997; Weidman & Stein 2003).

The collaborative model also postulates the teleological development of students. The constructivist approach, on the other hand, asserts the influential role of individual knowledge, perception, interpretations of situations, and the effect of micro-environments, therefore denying the existence of a uniform, planned student ideal. The constructivist view of socialization is aware that school communities come to life through special interpretive activity. Teachers and students play a creative role in constructing a valid meaning to the school. Instead of being introduced to the fixed roles, objectives, value preferences, and behavior patterns of the school, they create them together during their everyday social interactions. It is in this specific social context that student socialization takes place; therefore, what students consider as an objective picture of the school, and their roles in it, is the very picture created by the community. It is exactly this tenet of the collective cognition and construction of reality (social epistemology) that makes constructivist approaches suitable for education researchers and educators. Some constructivist researchers, in their analysis of the discourse of school-related conflicts, focus on how students are shaped in a specific situation at school. Such situations underscore the individuality and momentariness of the construction of meaning and of reflecting upon one another. Meanwhile, another branch of researchers attach importance to the relatively stable context provided by the cooperating actors in educational institutions, and therefore do not emphasize the individuality and situationality of the construction of meaning, but instead highlight the lasting character of institutional culture, which they regard as the result of the joint construction of meaning. Irrespective of its trends, the overall advantages of the constructivist model are that it can hone in on the institutional level and, by giving further thought to the dynamic model of student socialization, it recognizes the rules of how institutional constructions of meaning and interpretations are disseminated. In this way, it creates

constructions
of reality

a more accurate picture of socialization than the illusory voluntaristic or the fatalistic reproductionist models, providing a more solid foundation for the work of both academic policymakers and teachers.

SOCIALIZATION AT SCHOOL AS AN INDIVIDUAL CONSTRUCTION

symbolic-
interactionist
approach

School experiences can be well interpreted within the framework of the **symbolic-interactionist approach** to socialization, which mainly applies qualitative research methodology and places greater emphasis on students' communication in the present and the changeable nature of role interpretations. The model presumes that students who go through socialization can be described as participants in an active dialogue, with productive readings of reality (Jensen & Vitus 2020). The construction of cultural meaning takes place at the individual level, and thus the conscious subjects of student socialization are students themselves, whose identities are being formed during their (self)-reflective activities. In this model, students are characterized by spontaneity, creativity, and autonomous development, which is independent of the official social norms represented by institutions. Influenced by this approach, research often focuses on the formation of student identity through the creation of social, gender, and disciplinary self-image, and partly unfolds an intricately segmented pattern of socialization based on the situational nature of relevant interactions.

The reason why this model proves to be more responsive to the heterogeneity of today's student population is because it targets a value-based approach to the structure of society and to lifestyle, which impacts individual situations (Reynolds et al. 2003). Firstly, it presumes that due to interactions with significant others who are currently in contact with students in educational institutions, be it their peers or educators, the meanings of the reality of the organization are constantly evolving and being corrected in students' minds. Secondly, it acknowledges that each student contributes to the construction of meaning as a productive innovator. As such, students leave their marks on the reality of institutions in multiple ways (Jokikokko 2009).

phenomenological
perspective

Phenomenological lifestyle and milieu research has shown that socialization at school cannot be standardized. On the contrary, students' life worlds display immense variety and diversity (Cross et al. 2003). Researchers who are consistent in applying the **phenomenological perspective** aim to capture the subtleties of the individual instances

of socialization when they interpret the process broken down into the segments of family milieu and student lifestyle (i.e., housing, eating, clothing, consumer habits) (Engler 2006). This model moves beyond the idea that the socialization of consecutive student generations is different, and states that since each student has an individual perception of the school environment, the socialization of students belonging to the same institution at the same time is also very different.

Contrary to the two reconstructionist models, this theory does not describe teleological development, because the student community is engaged in a mutual and flexible exchange of rules, rituals, and forms of communication, as well as an active internalization of practical knowledge. Former student culture, being in constant motion, can only serve as a source of coordination (Huber 1991). This model is analogous to a process of negotiation, in which individuals' socialization at school is never brought to a conclusion. This is because their attitudes to the student body's shared opinions can undergo changes during the years of study, always depending on their current relationship structures. Focus shifts from the outcomes to the process, which can be captured only through some snapshots which, due to their individual character, cannot be understood as general indicators of the situation and state of mind of the entire student population (Pusztai 2015).

Individualistic models are centered around the flexible and responsive formation of identity. Neither the common core nor the outcome of student socialization can be grasped, and the existence of a diversity of orientations side by side in an institution constitutes a kind of fragmentation. The merit of this model is that it responds to the heterogeneity of today's student population and is sensitive to a value-based differentiation of lifestyle, which determines individual situations. Its weakness, on the other hand, is that it pays less attention to school context than expected because of its individualistic perspective.

Individualistic models

THE ROLE OF SOCIAL NETWORKS AT SCHOOL IN STUDENT SOCIALIZATION

As the constructivist model is centered around the creative dialogue between individuals and their environment, it can interpret the life worlds (cultures) of schools, and from this perspective, the reality of education in each institution can be regarded as students' relatively stable and joint creation. The constructivist social network model does not claim that there are as many versions of student socialization as

there are students, but it assumes that certain interpretations occupy a dominant position in student communities. If both the quantity and quality of interactions reach a critical level, cohesion develops in the social network and students become embedded in the culture of the community, which comes to exercise control over them. In this way, they will be able to participate in the creation of a distinct interpretation of the school. Identifying the dominant **interpretive communities** among students leads to understanding the processes of socialization. Students, embedded in these interpretive communities, give life to the world of the school together and can create coherent meaning, articulating their common response to important goals and values, and laying down de facto (latent) rules alongside – or instead of – the Mertonian de jure (manifest) ones (Merton 1968; Fish 1980; Berger & Luckmann 1966).

interpretive
communities

social network
structures

Research on **social network structures** among peers within academic institutions has begun to receive more recognition in recent decades. Coleman's theory holds that students' behavior is significantly influenced by the social network structures of school communities, the content of the information, values, and norms communicated through them, as well as by shared attitudes towards organizational goals (Coleman 1988; Pusztai 2006; Pusztai 2011). Studies have shown that, among institutional sources of social capital, the most efficient ones in education are the stability of intergenerational relationships, the density of closure-like social networks within institutions, and the range of extracurricular activities on offer. The most efficient institutional model, according to Coleman's findings, relies on a functional school community based on networks which are cohesive both formally (with regard to the strength and openness of the relationships) and in terms of content (with regard to the values and norms they share).

Under the influence of the constructivist shift, social science has come to reinterpret the old concept of community, shifting the focus onto the joint construction of meaning by the members and onto the individual construction of the boundaries of the community. The concept of the spatially well-defined community was revised based on Cohen's theory of symbolic community: the subject of his investigation, going beyond the formal questions of the structure of individuals connected by relationships, was the interpretations of culture that provided cohesion in communities (Cohen et al. 1972). Students' relationships were understood as a network surrounding the individual, which creates and uses relatively coherent meanings, as is illustrated by Fish's concept of interpretive community (Fish 1980).

TABLE 1: The process and factors of student socialization in the paradigms discussed

	Reconstructionist		Constructivist	
Theoretical basis	Structuralist-functionalism	Critical, theory of conflict	Symbolic interactionist	Constructivist social network
Process	Linear model, can be concluded, intentional	Acculturation (reeducation/deculturation)	Negotiation, momentariness	Relational and cultural embeddedness depend on stability
Main point	Teleological, the systematic reconstruction of social norms	Teleological, reproduction of the power structure of society	Individual interpretations	Interaction of context-dependent interpretations results in individual institutional effects
Student	Subject of socialization, a passive participant	Dispositions determined by class habitus	Actor, productive innovator	Joint activity of students and their social networks in and outside institutions
Outcome	Uniform outcome	Outcome depends on class	Individual orientations, fragmentation	Depends on context: produced in interpretive communities
Setting	Macro-level: educational policy, economic voluntarism	Power conditions represented in institutions	Micro-environments, momentary interactions, situationality	Embeddedness in social networks (cohesion, multiplexity, content of interpretations)

The most relevant model of student socialization, in our opinion, is social networks as constructors of meaning and disseminators of interpretations. One of the vital questions to be studied is the identification of institutional social networks which can best construct interpretations that support students' development. The issues that urged investigation into the hidden features of student socialization were earlier problems in primary and secondary education, unequal access to education by students of different social status, and demographic and ethnic backgrounds, as well as attempts to reduce attrition.

embeddedness

Based on the Granovetterian concept of **embeddedness**, distinction can be made between three dimensions: students' personal relationships (relational embeddedness), the structural features of the social networks surrounding them in their institutions (structural embeddedness), and the effects of the dominant values and norms of their social networks on them (cultural embeddedness). Relational, structural, and cultural embeddedness can be viewed as the dimensions of student socialization, which is characterized by the views and interpretations it creates. These processes are further modified by forces, called structural constraints, in reconstructionist models. However, student socialization becomes visible through the choice of social networks and participation in the construction of meaning.

SUMMARY

In this chapter, we have compared authoritative theories in order to gain a clearer understanding of socialization in academic settings. We have found that the concept of student socialization can be interpreted in various theoretical paradigms, which give a range of explanations of earlier and recent school phenomena. According to the structuralist-functional model, student socialization takes place in line with the goals of institutions and education policy, resulting in a uniform image of students. The reproductionist model states that students are shaped by the constraints of transmitting power structures. A limitation, however, is that it ignores individuals' intentional orientations because it relies on either voluntarist teleology or class determinism based on conflict theory. Moreover, it does not attach any significance to individuals' own decisions and neglects the role of social networks in shaping student behavior. The symbolic interactionist model aims to capture the subtleties of the individual instances of socialization, but due to its individualistic approach, the image that it gives of school phenomena is fragmented and difficult to interpret. Finally, we have presented the structuralist social network approach, which regards student socialization as embeddedness within school communities.

QUESTIONS AND TASKS

1. What are the foundational features of socialization?
2. How would you characterize the structuralist-functional model of socialization at school?

3. What are the main features of the critical model of socialization at school?
4. What are the basic tenets of the symbolic interactionist approach to socialization at school?
5. What are the key concepts used in the social network approach to school socialization?

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GABRIELLA PUSZTAI

Forms of capital utilized during a student career

Not all students perform equally well at school. Several theories of the sociology of education interpret these differences as returns on various forms of capital. Theories of capital not only differ in the concepts they use, but also in their approaches to society, including the role and possibilities of schools. This chapter gives readers an insight into the explanations of differences in performance based on various views of society.¹

Key concepts

Human capital: All partly innate and partly acquired physical and mental skills, abilities, knowledge, and qualities possessed by humans serve as resources for them to be invested, increasing their productivity and “market value”. In addition to exerting an influence on the quality of individuals’ lives, as well as their financial and social status, human capital also produces social benefits. It was incorporated into the paradigm of social sciences after the 1960s, mainly due to the work of Schultz, Mincer, and Becker. Human capital is not equal to **knowledge capital**, which is one of its important components and is therefore of special significance to research in the field of the ecology of education. Due to its external benefits, it has a marked impact on society (see **spillover effect**). The concept of human capital is also used by Coleman in a sense corresponding to Bourdieu’s notion of **cultural capital**.

Cultural capital: In response to the theory of **human capital**, Bourdieu created the concept of cultural capital. Its three main components are incorporated, objectivized, and institutionalized cultural capital. **Incorporated cultural capital** is the part of one’s personality (or habitus) which consists of interiorized, deep-rooted skills acquired during socialization in the family and at school (language use, taste, behavior, knowledge, etc.) **Objectivized cultural capital** is the total of the cultural

¹ This chapter is the revised version of two works by Gabriella Pusztai: a chapter from *A társadalmi tőke és az iskola [Social capital and schools]* (Budapest, 2009, Új Mandátum) and *Tőkeelméletek az oktatáskutatásban. [Theories of capital in education research]*. In Varga A.: *A nevelésszociológia alapjai [The basics of the sociology of education]* (Pécs, 2015, PTE-WHSz).

assets possessed by individuals (books, works of art, musical instruments, IT devices, etc.), which individuals can utilize only through their incorporated capital. **Institutionalized cultural capital** is the tangible evidence of cultural competencies (certificates, degrees, diplomas, scientific titles, etc.), which “confers on its holder a conventional, constant, legally guaranteed value with respect to culture” (Bourdieu 1986:248). According to Bourdieu, apart from being determined by social inequalities, the possession of cultural capital also maintains and perpetuates these inequalities.

Social capital: The notion was created simultaneously by both Bourdieu and Coleman in the 1980s, but it was Coleman’s work that solidified it into the foundational framework of the theory of social science. Social capital manifests itself in interpersonal relationships; in Bourdieu’s words, “social obligations (‘connections’), which is convertible, in certain conditions, into economic capital” (Bourdieu 1986:245), but he attributes less significance to it than to economic and cultural capital. Coleman, in contrast, believes that it is this form of capital that can be best converted into **human capital** and can compensate for the lack of other capital. Grounded in shared norms, mutual trust and exchange, social capital is reproduced through living relationships. Regarding content, it is a shared system of knowledge and commitment; its structural aspect can be described with the quantitative and qualitative features of relationships. The various components of its definition, such as the advantages and disadvantages of various types of relationships and communities, or the efficiency and function of social capital, are still debated.

Social network analysis: A research method which originated in social psychology in the first half of the 20th century to map the relationships to be found within micro communities. Presently, its application has been extended to the social networks of larger communities, as well as to entire social structures. It can be used to explore the structural aspect of social capital (network structures, quantitative features of relationships, and boundaries between social networks), to analyze individuals’ social networks, and to identify their position within them. The members of social networks are referred to as nodes (see **bridging social capital**); the boundaries are either natural as in a **priori networks** (e.g. a class at school), or aggregated by researchers, like how the subject of study can be a certain type of relationship (e.g. friendship) or every type of relationship an individual or group is involved in.

Habitus: According to the theory of social reproduction, habitus is the primary channel of transmitting social inequalities. Habitus includes all prior inclinations, expectations, and values imprinted during experiences arising from individuals’ social position and during everyday practices (upbringing in the family), which match individuals’ objective life circumstances, ensuring that their anticipations of their own future correspond to the most likely course of their careers. It helps the adjustment to objective circumstances and the realistic perception of one’s prospects, which determines one’s aspirations for higher education.

THE CONCEPT OF CAPITAL IN SOCIAL SCIENCES AND EDUCATION RESEARCH

The sociology of education has adopted the notion of capital from the field of economics, to which it has been a central concept for centuries. Originally, capital was defined as a physical entity, such as land or machinery, or as financial assets suitable for making profit, reproducing itself and being invested into the economy. Classical authorities on economics, however, soon concluded that humans themselves (with all our intellectual assets, qualifications, working power, and utilizable information) can also be conceived of as capital. The concept of human capital was first mentioned by the English scholar William Perry, who attempted to assess the amount of human loss in addition to material loss after the war in 1676 (Becker 1962). In the 18th and 19th centuries, he was followed by several scholars who introduced numerous other forms of capital, only some of which are still popular today.

extension of the
concept of capital

This **extension of the concept of capital** has been resented by many researchers, who, often on moral grounds, contend that it has been immoral to degrade humans into assets or capital since the abolition of slavery (Schultz 1963). Others criticize the use of this term because of its ideological and political overtones, as it places the central value of capitalism on a pedestal, creating the impression that everybody possesses capital (Robison et al. 2002, Claridge 2018). The third line of criticism points out the inaccuracy of the concept of capital, and its unsuitability for measurement, therefore regarding it as a superfluous economic metaphor and condemning its application to other disciplines as “economics imperialism” (Bruce 1993). Nevertheless, since the second half of the 20th century, theories of capital have become unavoidable in the sociology of education, regardless of whatever criticism they may invoke (Pusztai 2015). What has contributed to the popularity of the concept of capital is that the factors referred to by this term have become comparable. They transform assets into other types of assets, can create one form of capital from another, keep their original condition during operation, are alienable and flexible, and can yield a wide variety of benefits or can be combined with other forms of capital. Their additional features include depreciation (how easily they deteriorate while being used) and reliability (how likely they are to function properly) (Robinson et al. 2002).

The concept has also retained its original meaning in social sciences, since capital in the economic sense is also often studied. As one of the basic factors of production, economic capital is an umbrella term for all assets

that can be invested into the economy to generate surplus value, i.e., profit. Its possession is one of the main indicators of status in modern societies. Bourdieu uses the term to denote capital that “can be directly converted into money”, seeing it as the most efficient tool to reproduce social structure (Bourdieu 1986: 243). Additionally, he regards it as a dominant source of capital because the distribution of all forms of capital is rooted in the unequal possession of economic capital. Coleman, on the other hand, prefers using the terms “physical” or “material” rather than economic capital, and believes it is social capital that can best be converted into human capital (Coleman 1988). The definition and study of capital may include social connections, membership of various communities, cultural resources, knowledge, possession of information, and various symbolic elements embodied in authority and prestige.

THEORIES AND MAIN LINES OF RESEARCH

THE THEORY OF HUMAN CAPITAL

The conception of humans as capital can be dated back to over three hundred years ago (Kiker 1996). In the original assessment of the value of human capital, its association with education and qualifications was quickly discovered. As Adam Smith expressed in *The Wealth of Nations* (1776), the labor and time invested in technical skills and knowledge makes individuals more productive (Smith 2016). The **theory of human capital** became accepted in scholarly research thanks to the work of some American authors connected to the Chicago school, e.g. Theodore Schultz (1963), Jacob Mincer (1970), and Gary Becker (1962). The novelty of the theory was that it interpreted several human activities, which had earlier been classified as consumption-related expenses, as investments made by rational choices, and even attempted to specify them in terms of money.

theory of human capital

Some of these investments, which primarily occur in (vocational) education, research, healthcare, and the migration of workforce, are in fact only expenses. However, they are ones that add to humans’ productivity and thereby to their market value by yielding returns, and consequently, fulfilling the criteria of investments. Their direct financial benefits can be illustrated by the comparison of the lifetime income curves of people with different levels of educational attainment. Those with lower educational attainment begin working at an earlier age and therefore secure a regular income sooner, the amount of which, however, falls behind the earnings of more educated people (who start working later but have higher incomes

with a faster rate of growth). If the intent to continue one's education and obtain qualifications are viewed as rational individual choices, they are profitable as long as the discounted returns (calculated relative to their present value) on the investment are higher than the discounted expenses involved (Polónyi 2019; Fényes & Mohácsi 2019).

The threshold depends on an individual's life span, mental and learning skills, capacity for vision, and external factors such as economic conditions, both in the present and the future. The investigation of the capacity for vision has led to the creation of a new concept: imaginational capital (Engler 2010). This relates to the idea that decisions made in the present largely depend on how individuals foresee the outcomes of their decisions. Engler states that poorly educated people, who usually lack this form of capital, underestimate the long-term profitability of investment into the future, which leaves them with present-oriented value preferences, whereas highly educated people are more conscious about the future due to their cultural capital.

Other relevant research areas include the association between health consciousness and educational attainment or the evaluation of investment into studying while planning the future. What makes calculations about human capital unreliable are the factors which do not translate into financial figures, as they must also be taken into consideration with a view to maximizing profits. Such factors include better working conditions, greater flexibility on the job market, increased adaptability to technical changes, improving life prospects, a higher level of culture, higher prestige, and building up more valuable social connection (Harbison & Myers 1964). This translates to cultural and social capital gains.

These externalities benefit not only individuals but also companies which organize training to increase their employees' human capital (and their own value). A particular location or region may also benefit by attracting a workforce with a higher economic potential, whereby the favorable effects spread over the entire population. This is the spillover effect (a term originally used in economics), a process in which an investment or integration implemented in one sector of the economy has a ripple effect on other sectors. The spillover effect plays a major role in the theory of human capital, but its undivided social advantages outweigh any individual benefits. For instance, a settlement's profile may be changed by the influx of a more highly qualified workforce. A rise in the educational attainment of society can be linked with a decrease in unemployment and crime, a wider acceptance of democratic values, a more

open way of thinking and a higher level of general knowledge. Factors that contribute to the economic and social development of a country also have their effects on individuals.

Consequently, the educational attainment and health status of a population can be regarded as quasi-public goods (or, at least, mixed goods). The extent of the public funding of education at various levels is a highly controversial issue, since it is difficult to separate collective returns from individual ones. In emphasizing that education is a quasi-public good, several experts make a case for state-funded education. The sociology of education refrains from calculating the expenses and profits of education in financial terms but attempts to identify the individual resources that support one's school career and conducts a comparative analysis of their effects, taking into consideration the fullest possible academic context.

The theory of human capital is prominently criticized for ignoring cultural factors and presuming that individuals' academic behavior follows an economic logic. Critics point out the error of interpreting students', parents', and institutions' behavior as that of entities guided by self-interest, aspiring to maximize profit in a rational way. This is a one-dimensional and under socialized image of man, which does not allow the idea of investment and returns to be interpreted based on value preferences or as a phenomenon with collective aspects. Sociologists of education hold the view that individuals have bounded rationality, as they do not possess information of sufficient quantity and quality when considering their opportunities, leaving them content with the alternative that appears just good enough to them, i.e., with bounded rationality (Elster 1983). Additionally, the information used to make investment decisions and the assumptions made about utility are influenced by culture and embeddedness in the social context. Raymond Boudon highlights that, apart from instrumental rationality (teleological, driven by self-interest), decision mechanisms are also influenced by axiological rationality. In other words, calculations made about investments and their returns are modified by actors' evaluative judgements of them (Boudon 2003).

Critics

CULTURAL CAPITAL AND THE THEORY OF REPRODUCTION

According to the **theory of cultural capital**, individuals are not rational actors but representatives of their social class, who give mechanical reactions rooted in their class status during their education. Various trends in the sociology of education, which are based on this tenet and

theory of cultural capital

are associated with the theory of conflict, regard society as the scene of different social interest groups' constant struggle against one another for obtaining and keeping goods and social positions. Authors influenced by Marxist theory and terminology claim that the struggle is between opposing classes (class fractions, strata), among whom resources (capital) are distributed unevenly. Groups in more favorable economic positions can accumulate other forms of capital as well, which helps them reproduce their power positions. Metaphorically, this phenomenon is called the Matthew effect, but the technical term is the theory of reproduction.² Its most renowned representative was Bourdieu, who developed his comprehensive theory in the 1970–80s, in which he differentiated between three main forms of capital: economic, cultural, and social.

According to his definition, which evokes Marx's labor theory of value, capital is "accumulated labor in its materialized form or its 'incorporated,' embodied form", a tool for producing profit and reproducing itself. The possession of capital makes it possible to appropriate social energy in the form of reified or living labor (Bourdieu 1986). He examines social structure in the vertical hierarchy in order to identify the factors that pinpoint individuals' positions in the structure of society. As a student of Max Weber, Bourdieu claims that structural forces are present in several dimensions. The most important force is economic capital, which corresponds to the concept of capital used in economics and is "directly and immediately convertible into money" (Bourdieu 1986:244). The second major structural component is cultural capital, which is mainly transmitted within the family, but qualifications attained in educational institutions determine it increasingly. The third component is the outcome of the unequal distribution of social capital derived from social obligations or connections (Bourdieu 1986). He regards economic capital as the dominant form of capital in the modern world. However, it is the conversion and aggregation of capitals that result in those unambiguous and permanent conditions in which **competing individuals**, guided by self-interest, behave as representatives of their social classes (their individual habitus being determined by their class habitus) in order to be able to transmit their capital to their descendants. The conversion of economic capital to cultural capital happens in reaction to the challenges of today's world. Success at school depends on families' investments into cultural

competing
individuals

² The metaphor originates from a verse in the Gospels: "Whoever has will be given more, and they will have an abundance. Whoever does not have, even what they have will be taken from them" (Matthew 13:12, New International Version).

capital, whether it is embodied in erudition or sophisticated language use and behavior (incorporated cultural capital), in the possession of cultural goods (objectivized cultural capital), or in holding qualifications of various levels (institutionalized cultural capital). Due to its material nature, objectivized cultural capital can be transferred, but its appropriate use requires incorporated cultural capital. Strategies of investment into studies are determined by previously accrued cultural capital in such a way that different social classes develop their special types of habitus, which consist of permanent attitudes towards the future, employment, or education. Bourdieu's theory pays special attention to conversion between different forms of capital, as owners of capital generally aim to preserve and increase their assets.

Exchanges between various forms of capital lead to closer connections (social capital) between people of similar status, contributing to the growth of economic capital through mutual favors and obligations (obligational capital). The role of education is highlighted by the temporal changes in strategies of capital conversion, since the theory holds that the massive expansion of education is one of the key elements of modernization. In modern, expertise-based economic organizations (also analyzed by Weber), cultural capital guaranteed by university degrees has become a determinant of position. This, in turn, has altered the upper middle-classes' strategies of reproduction. Owners of wealth convert part of their assets into educational investments. Children from families possessing economic capital have high chances of securing well-paid jobs and establishing a career very fast thanks to their qualifications obtained in highly demanded fields in renowned institutions, to their social networks, and to their symbolic capital rooted in their prestigious connections. This is how cultural capital is reconverted into economic capital. The school system is an efficient tool in the hands of privileged social classes and class fractions to legitimize the reproduction of cultural capital as its unequal distribution not only accounts for the class differences in academic success but also makes individuals and families accept the school career prospects that they perceive as plausible. This theory warns of the unbeatable advantage of those at school who communicate better, feel at ease in the world of high culture, behave confidently in various situations, have more background knowledge, are more experienced in gaining information, and are better equipped to do so, as well as of those who find their way better in the maze of institutions and the school system (Bourdieu 1986). In this model, the school system is indisputably the institution which

obligational
capital

social inequalities enforces the acceptance of **social inequalities**, and teachers are expected to force the mainstream way of culture acquisition on their students (De Graaf 1986, 1989). Communication within the school system is imbued with power relations, and the chances of ambitious low-status students receiving excellent evaluations are inherently meager.

THE THEORY OF SOCIAL CAPITAL AND ITS ROLE IN COMPENSATING FOR DISADVANTAGE

social capital The term **social capital** was coined in the early 20th century by Hanifan (1916), an American education researcher, who regarded networking based on the established rapport among families within a neighborhood in connection to a school community as an independent factor. The significance of this idea lies in the fact that belonging to a community enhances the efficiency of schools, contributing to the solution of problems such as individualization, atomization, general loss of trust, and the integration of immigrants. Hanifan's mentor, Dewey, emphasized the collective educational function of schools, which is capable of bridging social divides. In his view, society was an alliance, in which locally connected individuals, as members of communities formed by schools, were able to withstand macro level processes endangering democracy. The theory of social capital was elaborated in the 1980s by James Coleman, an American sociologist of education (Coleman & Hoffer 1987; Coleman 1988, 1990). Parallely, Bourdieu created his own concept of social capital, which, however, was not underpinned by a full, coherent theory. While Coleman maintained that social capital is generated when people

values and norms within a network share similar **values and norms**, Bourdieu's concept is centered around the type of social capital which is derived from influence and relationships. Several researchers find the concept of social capital insufficiently defined, too general, or not measurable enough in economic terms and consequently prefer the term network or relationship capital, especially in economics and the sociology of economics. These approaches mainly focus on instrumental relationships established for gaining benefits, which enable the beneficiaries to exploit people outside the social network. At the same time, authors who focus on relationships based on rapport and no calculation insist on the term social capital.

Bourdieu also uses the term **obligational capital** for this concept and associates it with the notion of **symbolic capital**. Another term is **authority capital** as it endows its owners with social status, determining their position, cultural recognition, and general prestige in society.

It is based on economic capital and objective positions of power, or “their manifestations seen and recognized as legitimate” by others, which helps to maintain power structures. In traditional societies, sources of symbolic capital include title, family rank, age, experience, as well as authority and honor accumulated in the family throughout generations. In modern societies, it depends on the scope of the social network that can be mobilized by individuals and on the amount of capital possessed by its members. In this sense, social capital is a means of maintaining social inequalities.

Coleman attempted a synthesis of the theories of human capital, rational choice, and exchange in contrast to Bourdieu, who followed the Marxian and Weberian line. Coleman’s theory is grounded in the idea of deliberate action taken to fulfill individual needs. Instead of accepting the dominance of a social structure composed of social classes and class fractions, he calls attention to another structure consisting of individuals’ relationships which span over class and class fraction boundaries, permeating the entire society. Apart from acknowledging the principle of rational, purpose-driven action, he also emphasizes the modifying effect of the specific social context. This approach can explain the formation of social structure as well as individual action.

In Coleman’s opinion, school-related processes (choice of school, student performance) are not only outcomes of individual choices and of one’s position in the vertical social structure, but also of specific social connections, which have an effect on individual choices. He differentiates between three forms of capital: physical (material, economic), human (see above), and social capital, to which he attributes primary significance. He regards social capital as a feature of **cooperating agents’** relationships in the system of social exchange but refrains from treating the system from a conflict theory perspective. Instead, it is discussed as the exertion of mutual influence. In Coleman’s theory, social capital is not a tool for exploitation.

cooperating
agents

Coleman does not elaborate on the formation of social networks. While Bourdieu lays great emphasis on the description of so-called institutionalization rites³, Coleman highlights the significance of existing, functioning relationships. He believes that there is a minimum amount

³ In order to reproduce social capital, constant investment of time and money is required (e.g. attendance of exclusive cultural and sports events, clubs and elite schools as well as residence in posh neighborhoods), which provides “initiation”. The boundaries of the group are closed, and newcomers may even pose danger to it.

functional communities

of interaction needed for trust to develop, group norms to be effective, and sanctions to be facilitated, i.e., for social capital to have its effect. He finds all forms of interaction efficient, whether they take place formally or informally. It is **functional communities**, families, neighborhood communities, voluntary groups, and religious communities that best fulfill the criteria laid down in his theory. His empirical research has also confirmed that institutions which are able to integrate or create organic student communities have proved more efficient.

Coleman maintains that individuals' purpose-driven actions are shaped under the influence of their relationship structures. Social networks are not the outcomes of planned investment strategies, because their primary functions are different (e.g., charity or religious organizations), and social capital only evolves as an unintended outcome. Forgoing the immediate benefits of connections will bring more profit in the long run, with all the energy seemingly wasted on maintaining relationships yielding its return.

In Bourdieu's conception, hierarchical inequalities prevail even within networks⁴, while Coleman stresses that network members have access to what they could not obtain individually. By abandoning the network, individuals cause harm not only to other members by discontinuing the chain of information, trust, and social control, but also to themselves. Coleman nevertheless admits positional inequalities in groups and highlights norms which function well in closed networks, sanction selfish behavior, and set self-interest aside.

social network

For Coleman, value primarily resides in the features of a **social network** (its stability, closedness, density, and attitude to norms), and the most abundant source of capital is the strong cohesion within a social network. For example, when an individual's friends are also one another's close friends, closure is demonstrated. This is a type of social network based on strong, closed ties. Regarding the potential of social connections for generating social capital, the most favorable ones are small micro-level circles where all network members are familiar with one another, shared norms safeguard against deviant behavior, and mutual trust stimulates

⁴ The more economic capital is invested into social capital, the higher the profit, and therefore "investors of the most capital" are likely to accumulate all the network's social capital, becoming its representatives or delegates. People invested with such powers may even turn against their network, which is called by Bourdieu the alienation of the purpose of social capital.

members to perform better, make sacrifices for the public good, and engage in charity. The most complex structures are **intergenerational closures**, in which parents, teachers, and children, along with their extrafamilial relationships, form a closed structure. Researchers find it especially important to belong to such social networks during one's school years, which enable the efficient transmission of norms and due to their spillover effect, also benefit those who would otherwise not be endowed with other forms of capital.

intergenerational
closures

Coleman's theory was developed further by Putnam (2004), who primarily focused on norms and trust, which he thought were more detectable in certain relationship patterns. In his view, dense and complex local networks grounded on solidarity have been replaced by relationships based on loose egocentric ties, which has led to an overall decrease in social capital. Shortage of social capital may give rise to phenomena that are harmful to the community, such as a growing crime rate, a decline in political activity, or even truancy and school vandalism.

Communities which create social capital are generally founded on close, cohesive relationships, the strong presence of which makes a society immune to unwanted influences. Having analyzed longitudinal data, Putnam has observed a decline in the involvement of people in voluntary communities (associations, religious and neighborhood communities, friendship, kinship ties). He has found that the overall amount of trust is decreasing at the societal level, as people only help one another on condition that they can reap instant profit on their favors. This is due to the joint effect of economic competition, the weakening of families, geographical mobility, technical development, and socio-political interventions. However, civic participation and membership in voluntary and/or religious groups both enhance trust and, in consequence, altruism.

Putnam makes a distinction between **bonding and bridging social capital**. The former can provide cohesion in small communities, whereas the latter is responsible for the ties connecting individual networks. The ability to establish bonding ties may predict willingness to form bridging ones. According to Burt's model, networks are realized in interactions, which provide the flow of resources (including information). Resources spread more easily within groups (in bonding relationships) than between them, but the key role is played by mediators, who act as bridges over the structural divides between networks (by forming bridging relationships). It is debated whether it is mediators alone who enjoy the benefits of their position or, due to the spillover effect, trust and norms of cooperation extend to every member of the group.

bonding and
bridging social
capital

In relation to the theory of social capital, Granovetter (1973) introduced a distinction between strong and weak ties, classifying and evaluating the strength of relationships by the total amount of time, emotion, and intimacy invested into them. Tight and multifunctional (multiplex) familial relationships or friendships constitute strong ties, whereas loose and acquaintance-level relationships form weak ties. Coleman attributes a more prominent role to strong ties (see closures), while others contend that, because of their limited number and scope, individuals defined exclusively by strong ties become isolated and are put at a disadvantage. In contrast, weak ties, while creating networks of lower density, are capable of bridging wider social cleavages. Individuals who act as bridges connect networks, make society a network of networks, and enable the flow of information.

QUESTIONS AND TASKS

1. What are the reasons for the application of the concept of capital to social sciences? What reservations do certain researchers have about it?
2. Define and explain the theory of human capital.
3. Characterize and evaluate the theory of reproduction.
4. Compare Bourdieu's and Coleman's theories of social capital.
5. Who are the major agents and creators of social capital at school?

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IMRE TÓDOR

Rational choice theories and school careers

Students' academic careers are determined by a series of choices, so it is worth examining what drives these choices. In recent decades, rational choice theory (RCT) has exerted a significant influence on the sociology of education (see Braun 2009; Diekmann 1999; Opp 2004; Schmid 2004, etc.). The long-lasting impact of the theory is due to its interdisciplinary nature, as it has been employed in theoretical and empirical research in all fields of social science. In this chapter, we first present the main concepts, principles, and variations of RCT and then discuss its role in the interpretation of the choice of schools.⁵

Key concepts

Rational choice theory (RCT): A social science theory which argues that an individual's academic career is interpreted primarily by individual actions based on rational choices. People's rational and calculated actions are at the core of rational choice theory.

Subjective expected utility (SEU): A theory underlying rational choice theory, used to describe the method of an individual's choice of the most appropriate action from a set of alternatives in any given situation.

Bounded rationality: Manifests itself when individuals do not have adequate information, are not aware of all possible alternatives, and, as a result, are unable to calculate every consequence of their choice. In these cases, individuals' choice is motivated by the search for the right alternative and the pursuit of sufficiency (satisficing).

Cost–benefit analysis: Individuals make decisions during their school careers by comparing investments and corresponding returns. They choose the alternative which provides the best balance. In other words, they seek the greatest possible return with the least possible investment and risk. However, the cost–benefit analysis is dependent on social status.

⁵ The chapter is a revised version of the chapter 'Theoretical approaches for the modelling of school choice' from Imre Tódor's doctoral dissertation titled 'Decision mechanisms underlying school choice', which was defended in 2019.

Primary and secondary effects of family background: The primary effect describes the transmission of cultural capital, while the secondary effect is produced through the choice of schools. The primary effect is observed in students' school performance, while the secondary effect is realized in parents' cost-benefit analysis regarding the choice of schools (assessing the return on investment).

RCT borrows the rule-based concept of social actions from Hume (1999), but its main question concerns the ways of understanding those actions. If we claim that people act rationally, then it follows that their actions are motivated by some intention or purpose which serves their individual goals, wishes, or needs in the short, medium, or long-term. People act freely by virtue of their free will, and actions inevitably involve choices. In principle, people can do anything within their freedom, which, however, practically always excludes other possibilities. Making a decision presupposes the inherent condition to act in a certain way but not in the various other possible ways. Thus, the indicated decision always limits the set of possible life outcomes (which, in principle, are unlimited) because acting in a certain way necessarily involves not engaging with all possibilities. To understand the individuals' motivations, we use the famous typology of social action put forward by Weber, which describes four types of action: “**instrumentally rational, value-rational, affectual and traditional**” (Weber 1987: 53).

instrumentally
rational, value-
rational, affectual
and traditional

The four types of action can be divided into two groups. The non-rational (irrational) category includes traditional action and affectual action, while the rational category includes value-rational and instrumentally rational action.

Traditional action is guided by daily routines performed in an unconsidered, almost automatic, manner. In Weber's words, traditional action is “determined by ingrained habituation” (Weber 1987: 53). Due to its unconscious nature, social sciences rarely investigate, and attach little importance to, this type of action. Affectual, sometimes referred to as emotional, action is determined by “specific affects and feeling states” (ibid.). In this case, no assessment takes place, but the action is intentional and sometimes even driven by strong emotions, with rationality playing a secondary role. Value-rational action is “determined by a conscious belief in the value for its own sake of some ethical, aesthetic, religious, or other form of behavior” (ibid.). In such action, rationality, conscious consideration, and “freedom of choice” (ibid.) already play a part. Value-

rational action involves a “free” choice of means but not of ends, as it is limited by its commitment to a certain value, which does not allow the consideration of all possible alternatives.

Finally, instrumentally rational action is taken “when the end, the means, and the secondary results are all rationally taken into account and weighted”, and rational consideration is also given to all possible alternatives. (Weber 1987: 54). In other words, an action is instrumentally rational if it is neither traditional nor driven by emotions (be it positive or negative). Instrumentally rational action differs from value-rational action in that it enables free judgment and rational calculation in terms of its means as well as its ends.

According to Weber, it is rare to find concrete cases of action which are purely of one type, which is why this typology is likely to blend in real situations. RCT however, only incorporates the Weberian instrumentally rational action, so we must also rely on this type of action, or its combination with another type, to investigate the choice of schools (Pusztai 2004).

Raymond Boudon was the first sociologist (of education) to apply RCT to the choice of schools. According to Boudon (1974), the choice of schools reflects a relationship between students’ academic performance, the selection mechanism of the education system, and family decision-making. To capture different decision-making mechanisms, he distinguishes the primary and the secondary effect of family background. The *primary effect* (Boudon 1974: 29–31) is traceable in students’ academic performance and between existing social groups. In this case, the family’s low socioeconomic status would be associated with limited success at school.

Raymond Boudon

The mechanism for this is the transmission of cultural capital in the family (Bourdieu 1999), whereby children of parents with a favorable cultural status enter school with an advantage, which is directly reflected in better performance. The *secondary effect* is produced through parents’ choice of the most suitable school for their children. According to Boudon, parents and children from different social backgrounds perform different calculations with respect to the choice of schools. People make a rational calculation (by comparing the investment and the rate of return or by conducting a cost–benefit analysis) based on their individual goals and choose whatever offers the best balance: the greatest possible return with the smallest possible investment. All of this is dependent on social status because, for instance, graduation does not carry the same importance for a student whose parents have a vocational qualification as it does for someone whose parents have a university degree.

According to Boudon, families with favorable socioeconomic backgrounds face a higher risk of their children not reaching the status level of the family, which they wish to avoid even if that involves sizable investment. While children of lower-status parents must take a burdensome path to higher education and bear higher associated costs so that they do not face the risk of losing their status. Consequently, it requires less effort and investment for them to obtain a lower level of qualification, while their status is still maintained. Thus, the cost-benefit analysis depends on parents' social status, which is why people from different social groups may reach different conclusions simply by choosing whatever seems optimal for them based on rational considerations.

It is unclear which of the two effects contributes to social inequality more. As such, it is worth asking whether the choice of schools is dominated by the primary or the secondary effect, or whether the two are equally important.

Goldthorpe

The model of rational action theory, put forward by Goldthorpe (1996), is based on Boudon's theory (Boudon 1973, 1974) and expands it by highlighting and refining its two specific elements. According to Goldthorpe, the choice of schools should be analyzed in a way which considers the fact that the parents' direct goal is not the admission to a school (which has only an instrumental function), but rather the acquisition of a certain social status. In other words, the goal is to preserve at least the current social status, even if it requires great effort and investment. This also means that individual decisions are to be assessed against aspirations relative to the individual status. Goldthorpe concludes that existing inequalities can be explained less adequately by the concept of cultural capital (as introduced by Bourdieu, see Chapter 2) than by the model of rational action proposed by Boudon. According to Boudon, only one of the several rational considerations is associated with the maximum attainable return for the future. In other cases, individuals choose between alternatives by considering arguments based on norms and values, whereby a specific worldview, value orientation, or spirituality may also play a role. This was described by Boudon as axiological rationality, which complements instrumental rationality (Boudon 2013).

weighting of the primary and the secondary effect

The differences between the new approaches to RCT lie in the weighting of the primary and the secondary effect. Breen and Goldthorpe (1997), as well as Esser (1999), attach particular importance to the motives of "status preservation" and the effects of varying educational returns, suggesting the dominance of the secondary effect. In contrast, Erikson

and Jonsson (1996) consider the primary effect to be more important, and their theory features coefficients for costs, probability of success, and educational return.

Esser's model of subjective expected utility (SEU) formalizes Boudon's concept of axiological rationality (1974, 1980), but places greater emphasis on the relationship between individuals and their environment. Individuals' rational actions are influenced by their own expectations and the potential costs of the decision, as well as by the alternatives, opportunities, and limitations of action determined by their environment (Esser 1999). Esser summarizes the assumptions of his theory in six points:

Esser's model
of subjective
expected utility

1. Each action is induced by a selection mechanism, namely the selection from and decision between alternatives.
2. Every chosen action has certain consequences.
3. The consequences can be assessed by individuals in different (subjective) ways: positive, negative, or neutral.
4. Individuals assess expectations regarding the consequences.
5. This is followed by an evaluation of alternatives according to certain rules. This constitutes the actual cost–benefit analysis, which is the assessment of the rate of return on investment and the evaluation of the expected value.
6. Finally, the process is concluded by the selection of the highest-value option from the available alternatives, which is carried out according to the rule of maximizing the expected utility (1999: 248).

Esser's model (1999: 266–275) assumes that, after completing primary education, parents and students can choose from several types of schools. For better interpretation and understanding, Esser narrows down the choice between alternatives to two major categories: students may choose 1) schools which offer vocational training and do not prepare for higher education (A_n); or 2) secondary schools which provide adequate preparation for higher education (A_b). According to Esser, this decision has three relevant consequences, which are all evaluated. First, choosing A_b and completing it successfully enables a favorable labor market position, which Esser terms profit or utility (U). Second, those who choose A_b incur certain additional costs ($-C$) at the same time, including lost wages, which they would receive if they had entered paid employment after completing vocational education without continuing their studies. Third, a great importance is attached to the preservation or loss of the social position which the parents have acquired by the time of making the

decision, mostly because of the associated consequences (for social esteem, self-image, etc.). If the only possible way to obtain the status achieved by the parents is through graduation from a demanding institution, the decision in favor of the vocational school would entail losing not only high potential earnings but also loss of status (-SV). Thus, there are two significant expected states. In the first state, corresponding to the school preparing for higher education, success resulting in utility (U) is expected with a certain probability (p). In the second state, the vocational school is associated with a loss of status (-SV) and corresponding expectations regarding its probability (c). Esser's basic model represents the utility function (EU) derived from the two alternatives (A_n and A_b) by equations. In the following, we describe the equation for vocational schools and secondary institutions which provide higher education (grammar schools).

$EU(A_n) = c(-SV)$ The situation is simple for those who choose a vocational school: $EU(A_n) = c(-SV)$. For students who decide not to pursue higher education, the loss of status (-SV) and the associated 'declassification' occur with a certain probability (c), if there is something to lose.

The equation for a school which prepares for higher education is as follows:

$$EU(A_b) = pU + (1-p)c(-SV) - C$$

$$EU(A_b) = pU + (1-p)c(-SV) - C.^6$$

If students choose this type of school, they succeed with a certain probability (p), but the related costs (-C) must be deducted. At the same time, failure may also occur with a given probability (1-p), whereby students have no choice but to drop out from the selected institution. In this case, higher education cannot be pursued, leading to a loss of status (-SV) with a certain associated probability (c). Parents therefore choose the school which provides the possibility of higher education to their children, which is in principle more beneficial [$EU(A_b) > EU(A_n)$].

$$EU(A_b) > EU(A_n)$$

Rational decisions may also involve various restrictions and constraints, which decision-makers must consider. We refer primarily to external constraints, such as the types, profiles, and capacities of schools in each region, financial constraints, or the student's academic performance (grades) and ability. It is important to evaluate the latter external constraint because high-prestige schools can select among students based on "demonstrated ability", which favors children from high-status families. Esser also questions the reasons for a remarkable

⁶ The notations in the equation are derived from English or German terms: C (costs), p (probability), SV (Statusverlust), U (utility), EU (expected utility), c (class).

fact evidenced by several empirical studies, which states that if lower-class parents' children struggle in school, the parents arrange a transfer to a less demanding school without hesitation. In contrast, middle-class parents do everything in their power to keep their child in the demanding school despite poor academic performance (Esser 1999; cf. Boudon 1980). This also has an impact on the choice of schools as the **calculation of return on investment** considers the possibility of the child being able to complete the given type of school successfully. As a result, the probability of failure is high for children of low-status parents with poor performance, so it would be irrational for them to invest in a high-prestige school type.

calculation
of return on
investment

Based on the theory of subjective expected utility (SEU), Esser intends to explain the outcome and motives of parents' choice of schools. However, the third step of Esser's model is missing in that it does not specify a transformation rule, which has been criticized by many.⁷ Because of Esser's specific intention to create a theory which is not limited to a specific field or case, it is a common objection that "his statements are too general, his concepts are abstract", proving it challenging to apply the theory directly to empirical data (Becker 2000: 458). Like Becker, many researchers question the rationality attributed to the individual, which is the basis of Esser's model, since decisions are often not made in a rational way.

We have already mentioned Weber's view that purely instrumentally rational action hardly exists, and, in reality, action types almost always blend. Some researchers of RCT also share this view and argue that a decision based on perfect and complete rationality is impossible because we do not always possess all possible information. Following this approach, **Simon** introduced the notion of **bounded rationality** (1982), according to which a comprehensive set of information is often not available when deciding, and even if it is available, the individual cannot realistically interpret it. Decisions based on bounded rationality (Simon 1982: 39) are characterized by cases in which we are unaware of all alternatives and cannot calculate every single consequence of our decisions. In these cases, two mechanisms come into play: the search for the right alternative and the pursuit of sufficiency (satisficing). In connection with the choice of schools, empirical findings (e.g. Sági 2003; Clausen 2006) draw attention to the fact that parents and children from

Simon bounded
rationality

⁷ Transformation rules translate certain individual actions into collective effects (Kunz 2004: 175).

different social strata have different levels of information about the education system, its mechanisms and structure, the nature of available school types, and the form of education best suited to their individual purpose, etc. (Andor 1998). Consequently, it can be assumed that high-status parents and their children will make their choice of schools with a larger and more carefully assessed set of information.

According to Simon, decision-makers already form internal aspirations before engaging in the search for the right alternative. When they find an option which sufficiently suits their aspirations and initial expectations, they stop searching and make the necessary decision. Simon terms this mechanism satisficing. In relation to the search mechanism, Simon distinguishes two layers: **procedural and substantive rationality** (Simon 1982). The former emphasizes the decision-making process, as the term suggests, while the latter focuses on the final result to evaluate how correct the decision was. SEU theory considers both layers of rationality, so it can be used as both a normative (prescriptive) and an empirical (descriptive) theory. In the context of the empirical analysis of the choice of schools, the point lies in the decision-making process, that is, the way in which the choice of schools is made. According to most theorists, the rationality of action is realized not in the outcome but in the procedure of choice.

In his study titled 'Klassenlage und Bildungsentscheidungen', published in 2000, **Rolf Becker** supplements and extends the theories by Erikson and Jonsson (1996) and Esser (1999). Based on empirical findings, Becker argues that **the choice of schools can be explained not by one factor but by several factors**. According to him, there is a difference between parental aspirations and the actual choice, which needs to be examined in two steps. He assumes that the first step of the choice of schools is that parents usually plan on their child attending a school which prepares for higher education. At the time of the actual choice of schools, which constitutes the second step, parents with high educational attainment, who mostly also possess high social status (Jürgens & Lengsfeld 1977), implement their aspirations and plans. The difference between planning and implementation is smaller for children of high-status parents than in families from less favorable social backgrounds, since high-status parents can navigate the intricacies of institutional mechanisms which otherwise severely limit the actual choice of schools.

Relying on Becker's model of rational the choice of schools explained above (Figure 1), the choice of schools can be divided into two sub-processes for the purposes of empirical analysis. According to Becker, performance-based entry selection must be considered, which takes

place between the parents' decision in favor of a particular school type and the actual school entry. Here, Becker refers to primary school teachers' recommendations for suitable secondary schools. At the top of the above figure, *macro-level* factors are displayed, namely welfare state, compulsory schooling, market economy and social stratification. Becker's main question addresses why the modern welfare state has not been able to solve the problem of inequality by introducing compulsory education and a series of educational reforms. Among *meso-level*, or institutional level, factors, we find considerations related to the "quality" and educational profile of the school (formal and informal factors, extracurricular activities, alternative programs, etc.). The examined *micro-level* factors include the strength of socialization from home. The nature of upbringing is likely to play a role in the choice of schools, in a similar way to the transfer of general skills, abilities and knowledge, or the level of verbal skills, general knowledge, and social competences. In addition, the choice of schools is also influenced by secondary behaviors such as punctuality, courtesy, and willingness to work, which all increase educational success and opportunities and reduce the risk of investment. In his study, Becker emphasizes that educational inequality is not necessarily the result of an individual's choice of a particular type of school. The great advantage of the **heuristic model** is that it has also been tested empirically.

heuristic model

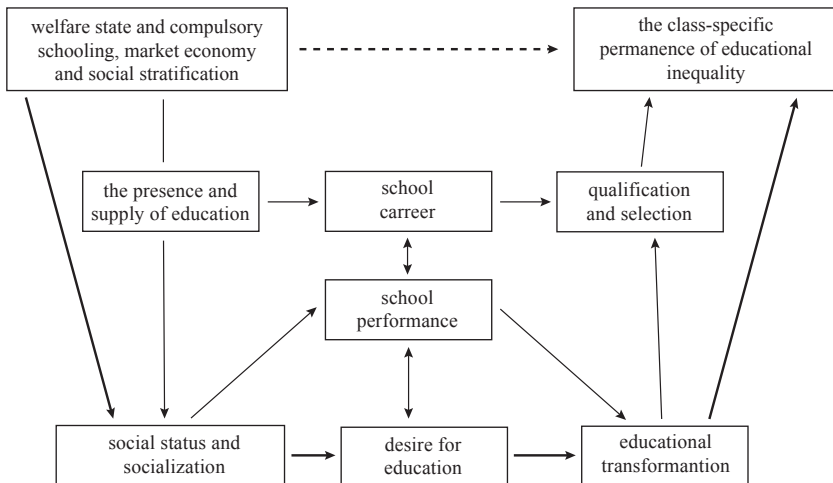


FIGURE 1: Heuristic model of the choice of schools

Source: Becker 2000: 457. (own figure)

In summary, we believe that rational choice theory and subjective expected utility models can be applied to the analysis of the choice of schools and provide an appropriate theoretical and interpretive framework for empirical research. This refers to the perspective of Simon's bounded rationality. Becker's heuristic theory and the empirical findings based on it suggest that the inclusion of other variables and theoretical models in the analysis provides valuable nuance to the multi-causal understanding of the choice of schools.

QUESTIONS AND TASKS

1. Support or refute the statement that there are inequalities of access between students from different social groups.
2. How does family background influence graduating secondary school students' choice of university and program? Consider the factors of economic, cultural, and social capital.
3. In your opinion, how does the search mechanism put forward by Simon materialize in graduating secondary school students' choice of university and program?
4. Justify the statement that high-status parents (from middle- and upper-classes) choose for their child a secondary school which prepares for higher education to preserve their social status.
5. Describe the relationship between the concepts of probability (P), benefit (B) and cost (C) using the specific interpretation used in the sociology of education.

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Differences and rivalry: gender in education

This chapter discusses the present position of both men and women in academics. We first cover male disadvantage, which is a recent phenomenon in education, and female disadvantage, which is a long-standing fact in the labor market. Next, we move on to gender roles, gender socialization, and young people's attitudes towards gender roles. We then address issues of horizontal and vertical segregation, which still result in women's disadvantage in education. Finally, we examine boys' and girls' performance at school and their participation in high culture. In those two fields, girls are at an advantage nowadays.

Key concepts

Male disadvantage hypothesis: Men who participate in secondary and higher education have a more favorable social background, while women take part in these levels of education even if their background is less favorable. Men have a disadvantage in education regarding not only attendance rates but also social mobility (Fényes & Pusztai 2006; Fényes 2012b).

Horizontal segregation: The male-to-female ratio varies among different academic fields and occupations. Although horizontal segregation is slightly losing ground in education, it still leads to women's disadvantage because choosing a "feminine" profession reduces an individual's chances of success in the labor market. As such, the prestige of female-dominated professions is well below that of male-dominated ones (Fényes 2010b).

Vertical segregation: The lower proportion of women at the uppermost levels of education, especially among university faculty and researchers. By contrast, their proportion is high in positions of lower prestige in education and research, and therefore their remuneration is also lower. There are fewer women in leading positions in the corporate world as well. The term "glass-ceiling phenomenon" indicates that, above a certain point, women's careers hit an invisible "glass ceiling", keeping them from further advancement after a specific point (Fényes 2010b).

Gender roles, gender socialization: Gender roles show substantial variation across cultures, historical periods, and social strata, although biological and genetic differences between the sexes are the same. The work of Mead and Merton's (if referencing a specific paper put a date here) points out that gender roles are acquired through socialization. What are regarded as traditional gender roles today go back to the time of industrialization, when public life and work became the domain of men. This assumption of men as the "breadwinners" left women in the private sphere to provide support and an emotional foundation. However, gender roles are undergoing significant changes in our age (modern and postmodern male-female and father-mother roles) (Fényes et al. 2020).

Status inconsistency: It exists between women's positions in education and in the labor market. Today, women are at an advantage in education, have more social mobility, more of them attend higher education, and they have better academic performance (especially in secondary education but, as some indicators show, in higher education as well). Nevertheless, they are still at a disadvantage in the labor market (Fényes 2012a).

MALE DISADVANTAGE IN EDUCATION AND FEMALE DISADVANTAGE IN THE LABOR MARKET

Hardly any occupations today are exempt from being gendered. The uneven gender structure of occupations is rooted in the gender structure of education (male dominance in vocational education, female dominance in general secondary education, and male or female dominance in certain degree programs in higher education). In the 1960s and 70s, the proportion of women were higher in programs training for low-paid and low-prestige professions in Hungary, as well as in most western countries. One of the key issues addressed by the sociology of education is whether women face the same disadvantages in education as in the labor market, or if they have caught up with men, perhaps now putting men at the disadvantage.

Female disadvantage is also present in education due to both horizontal and vertical segregation (see later) but, altogether, **male disadvantage** is more common. In Hungary, as well as in other developed countries, women make up the majority in general secondary schools and among higher education students, and there are also some high-prestige degree programs where the majority of students are women (law, economics, medicine). Between 1937 and 1980, the proportion of women in Hungarian higher education rose from 14% to 50% and, in 2008, the

male
disadvantage

proportion of female higher education students in full-time, part-time, and correspondence courses altogether was around 56% (Fényes 2010a). In the past decade, this rate has stabilized at 52% (KSH 2021).

male
disadvantage
hypothesis

Our data supported the **male disadvantage hypothesis** (Fényes & Pusztai 2006; Fényes 2021b), namely that men only enter higher education from favorable backgrounds. In other words, they show little social mobility, while women continue their studies even if their background is less favorable. We found that men, as a collective, need to perform at a higher level in order to be admitted to secondary and post-secondary education. Therefore, the male student population is more select, which is a disadvantage compared to women. Male students who attend general secondary schools and higher education are provided with more cultural and financial capital by their families, have a more advantageous place of permanent residence, and more social capital. Put simply, they need to mobilize more resources than female students. While women, despite their potentially low-status families, prefer continuing their studies in general secondary and higher education. On the other hand, men from similar (or worse) sociocultural backgrounds are likely to end up in vocational education. Women have further advantages in participation in high culture and academic performance, which we will discuss later.

there is status
inconsistency
between women's
positions in
education and in
the labor market.

However, disadvantages facing women are still prominent in the labor market. Most developed countries demonstrate that women earn less in spite of being more qualified than their male counterparts. In this regard, **there is status inconsistency between women's positions in education and in the labor market.** The three main reasons for the gender pay gap are horizontal segregation (the separation of masculine and feminine occupations, and the lower prestige and financial recognition of feminine ones), vertical segregation (fewer women in leading positions: the so-called glass-ceiling phenomenon, i.e. above a certain point, women's careers hit an invisible "glass ceiling"), and discrimination (women are paid less for doing the same work) (Fényes 2012a).

GENDER ROLES AND GENDER SOCIALIZATION

Gender socialization and the development of gender roles, which partly take place at school, are among the most important research areas concerning women's situation. Another major field of research in the sociology of education addresses young people's attitudes towards gender roles (see next section).

Gender roles are behavioral characteristics, rules, and norms which are typical of men and women in each society. Gender roles show substantial variation across cultures, historical periods, and social strata, despite biological and genetic variation between the sexes being the same. From this it follows that gender roles are primarily acquired through socialization. It was Mead (1949) who called attention to the fact that gender-specific behavior patterns typical of developed countries did not prevail in other cultures. For example, in the New Guinea Islands Region, women in some tribes had a positive attitude to making physical effort, were inclined to aggression, did not show their emotions, and endured pain and suffering, whereas men bore more resemblance to “civilized” women. Furthermore, Merton (1968) observed that gender roles had undergone considerable changes throughout history. For example, in hunter-gatherer societies, men and women were equal partners, taking an active part in production and sharing the task of child-rearing equally.

Gender roles

The idea that “women’s place is in the home” and their only tasks are to bring up children and do housework is relatively new. As machines appeared with industrialization, the female workforce came to be less demanded, which led to the separation of private and public spheres. Public life and work became the domain of men, who assumed the role of breadwinners (**instrumental role**), leaving women in the private sphere to provide support and an emotional background to their partners (**expressive role**) (Parsons & Bales 1955). This is called the traditional division of gender roles, which was by no means the prevailing practice before the time of industrialization.

instrumental role)

expressive role

By now, women have reestablished their presence in working life. The number of jobs that women cannot do is decreasing in modern societies, so there is no need for a division of labor between the sexes. In the modern view on gender roles, individuals’ behavior is not primarily determined by their sex. Gender roles have become more balanced, so much so that in some countries there are families where the breadwinner is the woman (Blackstone 2003; Jurczyk et al. 2019). As well as women’s roles, **men’s and fathers’ roles** are also changing, and the widespread appearance of modern roles has given rise to male and female role conflicts. For most families in the postmodern world, both parents need to be breadwinners and are supposed to do their share of child-rearing and housework. While women’s traditional role conflict (family versus career) is a well-discussed subject, men’s role conflicts are a new but increasingly important area of research. Research from the 1980s reveals that the main causes of male

men’s and fathers’ roles

role conflicts were fear of femininity and difficulty showing emotions (David & Brannon 1976; Farrell 1974; O'Neil 1981). The change in paternal roles is another question to be studied. Ostner's (2002) model of paternal roles are based on the degrees of breadwinner roles (strong, medium, weak). Lorentzen (2013) also differentiates between types of paternal roles: "fathers for the family" provide for their families by creating material security, whereas "fathers in the family" take an active part in family life and childcare. The distinction between the traditional and modern father role has been made by Voltz (2007). In his view, traditional fathers are breadwinners and modern fathers are those who consider emancipation necessary, playing an active part in domestic work and child-rearing. Nowadays, it is a novelty that fatherhood counts as a key component of men's success and self-fulfillment.

gender
socialization,
the effect had by
family, school, and
peer groups

As mentioned, gender roles are acquired through socialization. The primary scene of socialization is the family; secondary ones include school, peer groups, media, and the workplace. This chapter discusses **gender socialization, and the effect had by family, school, and peer groups**. Sex differences are inborn, as every child has an assigned sex at birth. It is, however, the family's task to reinforce their children's sexual identity by, for example, dressing daughters in "girlish" and sons in "boyish" clothes or using different words when speaking to them as babies. Later, children are given toys appropriate for their sex: boys get toy cars, girls get dolls. As such, parents' expectations of their children are determined by their sex. Boys and girls are expected to fulfill different roles in life and have different careers. Although parents usually claim to treat their children in the same way, research has shown that child-rearing patterns differ by sex (Giddens 2017). One of the secondary scenes of socialization is the school. In a school setting, children are at a relative distance from their parents, so their relationships with peers and teachers matter more. Although in formal education settings, gender stereotypes are present in the curriculum and in textbooks, gender socialization happens not only through formal learning but also unconsciously, through the hidden curriculum. Teachers have different attitudes towards boys and girls, having differed expectations. Both teachers and parents expect different performance from boys and girls in different school subjects: boys are expected to do better in sciences, whereas girls are expected to excel in art subjects. Studies have underlined the role of peer groups and copying the behavior of same-sex peers, which have proved to be even more important than the influence of the family and school.

GENDER ROLE ATTITUDES OF YOUNG PEOPLE

The term “gender role attitudes” signifies the population’s views on gender roles and on the division of labor in families. During the era of socialism in Central and Eastern Europe, families predominantly consisted of two breadwinners (women worked full-time). However, Hungarian data between 1971 and 2001 reveal that people identified with traditional gender roles, namely that men are the breadwinners and women are expected to give emotional support and do the housework. At the same time, they still accepted that most women had to work to earn enough to support their family. By 2011, a slight shift had taken place towards the acceptance of modern gender roles. As for the roles of fathers, Hungarians still find the traditional role of breadwinner and decisionmaker important (and necessary), but they also attach equal importance to the involvement of fathers in child-rearing. Gender and educational attainment appear to have a strong impact on opinions as modern father roles are generally approved of by women and people with high educational attainment (Fényes et al. 2020).

“gender role attitudes”

Gender roles change more rapidly among younger generations than among more elderly age groups, although young people still choose their fields of study and work according to traditional gender roles (Tinklin et al. 2005). Moreover, some researchers (Astin & Kent 1983; Astin 1977) claim that higher education institutions scarcely do anything to break stereotypes. Bryant (2003), on the other hand, found that during their years in higher education, young people’s attitudes changed from traditional to more modern. This change is reinforced by close contact with peer groups, integration into the campus, participation in women’s studies courses, and experiencing diversity on campus.

Gender roles among younger generations

Our own studies (Fényes 2010a; Fényes 2014; Fényes et al. 2020) have revealed that, while boys apply for admission to higher education to obtain good chances of employment and well-paid jobs (pragmatic considerations), girls give priority to learning itself and to the consequent increase in their cultural capital (which does not necessarily result in success in the labor market). Although the public assumes that gender roles are being transformed (especially among young people), higher education applications and choices of majors still reflect behavior dominated by traditional roles. However, our recent research findings show that, compared to 2010 when almost half of higher education students opted for traditional gender roles, in 2017 only slightly over one third of them were traditionalists, suggesting a wider acceptance of modern roles.

We also found, in line with the literature, that female higher education students were more likely to accept modern views than male students, and parents' higher educational attainment and a better financial situation also had a positive effect. Students' religiosity might also be an important indicator. Our investigations suggest that students who are either religious in their own way or follow the teaching of a church are inclined to accept traditional gender roles, but belonging to the latter group significantly increases the acceptance of fathers' involvement in the family (which is a postmodern attitude). Hence it is not a fully valid statement that religious students have traditional views on gender roles because, on the contrary, following the teaching of a church increases the chances of belonging to the cluster which holds the most modern views and highlights the joys of fatherhood.

HORIZONTAL AND VERTICAL SEGREGATION IN EDUCATION BY GENDER

horizontal
segregation

vertical
segregation,

This phenomenon has not disappeared from education either in Hungary or in other developed countries, although most higher education students today are women, who also have an advantageous position at other levels of education. The feminization of certain degree programs continues, but at the same time, other typically male-dominated fields are increasingly welcoming more women. Although **horizontal segregation** is slightly decreasing in education, it still puts women at a disadvantage as the choice of "feminine" occupations worsens their labor market positions. Moreover, occupations dominated by women are held in much lower esteem than those dominated by men. Regarding **vertical segregation**, the proportion of women is lower at the uppermost levels of education (in PhD courses and among university faculty). By contrast, their proportion is high in positions of lower prestige in education and research, where their remuneration is lower (Fényes 2010b).

In OECD countries (The Organisation for Economic Co-operation and Development), in bachelor's or corresponding programs of teacher education and health studies, the proportion of women continues to be outstandingly high, and the proportion of men shows similar tendencies in engineering and IT (OECD 2019a). It is important to note, however, that today women slightly outnumber men in legal and medical professions, which are well-paid but anthropocentric (Pinker 2008).

causes of horizon-
tal segregation

One of the possible causes of **horizontal segregation** is differences in socialization. Teachers and parents expect different performance from

boys and girls (e.g. girls are expected to have better reading skills, boys are expected to be good at mathematics), which becomes a self-fulfilling prophecy. This is partially why boys and girls choose education paths which suit their respective gender identities. The sociological approach to this question places emphasis on the effect of traditional gender roles and stereotypes, as well as on social norms and values on career choice (Jacobs 1995; Charles & Bradley 2002; Barone 2011). The economic approach of Becker's (1991) rational choice theory holds that girls prefer choosing courses and professions which enable them to achieve a good work-family balance in the future.

It is also possible that there are actual differences between boys' and girls' cognitive skills which account for their different academic paths. Researchers are divided as to whether these differences – if they really exist (see the section on boys' and girls' performance at school) – are due to biological factors e.g., differences in the functioning of cerebral hemispheres. It can be detected that early socialization also has an impact on biological difference and, therefore, the ultimate cause lies in different socialization (Halpern et al. 2007).

Trends in the choice of academic fields are also constantly changing. In the past, law and economics were dominated by men, whereas today only STEM professions (science, technology, engineering, mathematics) are seen as “masculine”. This trend supports the view that choosing a career is not biologically determined (Spelke 2005). The fact that few women choose STEM careers is rooted in different career orientation, parental influence, psychological barriers, and the lack of social support (Jacobs 1996).

Trends in
the choice
of academic fields

Dryler (1998) has found that students are more likely to choose gender-atypical educational routes if their parents have also had gender-atypical education or work in such areas. It has been observed that low-status students are more affected by horizontal segregation. Seehus (2019) points out that students from favorable backgrounds are more likely to choose gender-atypical educational routes due to the wider acceptance of gender equality in their social classes. Additionally, women from favorable social backgrounds tend to choose high-prestige fields (e.g. STEM) in the hope of status reproduction or social mobility.

The choice of academic field is also influenced by contextual factors. Charles and Bradley (2002) have found that horizontal segregation is more typical in countries where gender equality is a generally approved norm (e.g. in Scandinavian countries), whereas in less developed countries (e.g. in Turkey) more women choose a STEM field. Stoet and Geary (2018)

attribute this to the fact that in less affluent countries, where gender equality is not widely accepted, it is out of economic necessity that more women choose well-paid professions previously dominated by men, which in turn diminishes segregation by gender. This is the so-called gender equality paradox.

BOYS' AND GIRLS' PERFORMANCE AT SCHOOL

Women's cognitive skills are not worse than men's; moreover, their school results are better. Girls' language comprehension and spoken skill, as well as their short-term memory, surpasses those of boys. Boys, on the other hand, have better spatial visualization, arithmetic, logical, and technical skills. These differences diminish with age. It is important to note that the distribution of men's intelligence quotients is wider, i.e., more of them have exceptional cognitive abilities but also more of them are mentally handicapped (Nowell & Hedges 1998). Data from 1960s USA show that girls had better learning outcomes in secondary education even when the effect of social background, skills, abilities, and participation in prep courses were controlled for. Girls also had a better self-conception of competence. It was only their mathematics grades that were worse compared to boys (Alexander & McDill 1976).

girls have
better grades in
mathematics

Nowadays girls even have better grades in mathematics than boys. In the USA and other developed countries, girls in secondary schools have higher mathematics GPAs than boys (Perkins et al. 2004; Clifton et al. 2008). OECD countries' data from 1991 and 2001 also show that in primary and secondary education, girls performed better in mathematics. Other researchers found that in the USA in the 1990s, boys had a minor advantage over girls in mathematics tests (Hedges & Nowell 1995), but girls already had better grades back in the 1950s and 60s (Buchmann et al. 2008).

science

At the turn of the millennium, 15-year-old boys had somewhat better PISA (Program for International Student Assessment) tests in mathematics and science, but their advantage was significant only in half of the OECD countries (Freeman 2004). Girls' slightly worse results stemmed from the fact that interest in the subject and confidence in one's knowledge varied by sex, as well as the fact that girls had developed a certain stereotypical fear of mathematics. Altogether, their poorer performance could not be traced back to poor abilities or biological characteristics (Catsambis 1994; Spencer et al. 1999; Spelke 2005).

reading
comprehension

Girls have outperformed boys in reading comprehension for a long time, but their advantage had slightly diminished by 2018 in 36 countries,

including Hungary. The reason for this, however, was a decline in girls' performance and not any improvement on the boys' part. The most recent PISA results show that now boys have no observable advantage over girls in mathematics and science. Despite this, there are still marked differences between the sexes in their higher education choices: out of all the girls who are capable and compared to boys, much fewer opt to pursue STEM fields (OECD 2019b). **Aspirations to enter higher education** is another performance indicator. In 1980, an approximately equal number of American boys and girls planned to continue their studies in higher education, while in 1996, 60% of girls and only 49% of boys did so. Girls are also more likely to continue their studies right after leaving secondary school and, due to their persistence, a higher proportion of them graduate (Bae et al. 2000).

Aspirations to enter higher education

As it has been pointed out, girls have better grades at all levels of education, so their **higher education performance** also surpasses that of boys (Buchmann et al. 2008). According to Canadian data from 1997, women outperformed men by 7% in higher education, although the difference was not significant. However, female students' advantage was significant in reading comprehension, debating skills, and coping strategies (Clifton et al. 2008).

higher education performance

In an earlier study on gender differences in academic efficiency (Fényes 2010c), we concluded that girls performed better in secondary schools despite their poorer background variables (see male disadvantage hypothesis). More of them participated in academic competitions, their grade point averages were better, and they had more ambitious higher education plans. At the tertiary level, however, women did not have better overall performance than men except for their grades. Having analyzed each performance indicator in isolation, we found that women still had an advantage in possessing certificates of language skills and plans for another postgraduate degree, but men surpassed them in certain academic variables such as publication during the years of study, participation in colleges of advanced studies, or plans for PhD, even though we controlled for the effect of their better socioeconomic background. The results forecast men's greater success in the labor market, especially in academia.

CAUSES OF GIRLS' BETTER PERFORMANCE AT SCHOOL

In primary and secondary education, knowledge and diligence have priority over creativity and brilliance of mind, which are more typical of boys. Girls are more diligent and better at memorization, while boys

Girls' learning techniques more efficient

aptly find connections between items of knowledge. **Girls' learning techniques** are usually **more efficient**, so they are more successful at primary and secondary school (Fényes 2010c).

boys get worse grades and their dropout rates are higher

Although there are hardly any gender disparities in cognitive skills, **boys get worse grades and their dropout rates are higher**. In researchers' view, it is disparities in non-cognitive skills that explain this tendency. Boys have more difficulty paying attention in class and co-operating, they are less helpful, and it is also harder for them to keep track of home assignments and other school material. Being thus given worse grades, they might be discouraged from continuing their studies (Jacob 2002). Boys are more likely to have reading disorders, while girls have better soft skills, behave better in class, have a more positive attitude to learning, and are endowed with better non-cognitive skills (Buchmann et al. 2008). They engage in extracurricular activities more frequently (except for athletics), such as cultural activities or student council work (Bae et al. 2000; Freeman 2004).

Girls' greater self-discipline

Girls' greater self-discipline also leads to better learning outcomes (Duckworth & Seligman 2006). Another reason might be the fact that parents are more likely to help their daughters than their sons with learning (if they have difficulties in mathematics, for example).

girls are more motivated to meet expectations

In addition, **girls are more motivated to meet expectations**, feeling that they must work hard, achieve well at school, and do as they are expected by their teachers and parents. This stems from their socialization, which is different from that of boys. What boys find important is professional mastery and other intrinsic rewards as opposed to girls' aspirations to earn social recognition or other extrinsic rewards (Mickelson 1989). Boys also have stronger self-confidence.

the feminization of the teaching profession

It is interesting to observe the relationship between **the feminization of the teaching profession** and girls' better outcomes. Girls at lower primary schools regard their female teachers as models to identify with, which helps them to adjust to school life. By contrast, boys do not find the school environment along with its requirements masculine enough, so they rebel against an education system brought to them by women. Some researchers, however, hold a contrary view: female teachers turn to boys with more attention and admiration, paying tribute to the opposite sex. It is debated whether boys achieve better if they have male teachers (Buchmann et al. 2008).

more intense cultural activity

Another cause of girls' better performance is their **more intense cultural activity**. DiMaggio (1982) points out that interest and engagement in culture is a norm for girls but not for boys. On the contrary, cultural activity can be negatively sanctioned by peers. Career opportunities and

concomitant financial benefits monopolized by men make women want to excel in the cultural market. Another explanation as to why **women have more cultural capital** is that “Women who wish to be recognized as eligible partners for men from high status backgrounds may need cultural capital to a greater extent than men who wish to achieve in the world of work.” (DiMaggio 1982: 198).

women have more
cultural capital

Girls in Hungary also show a deeper interest in culture than boys. Girls’ advantage manifests itself mainly in the use of “high culture” (consumption of literature, theatre, cinema, classical concerts, art movies), whereas boys are at an advantage in modern forms of cultural activity such as the use of the internet. Thus, boys’ and girls’ cultural activities can be described as different without either of them being inferior to the other (Fényes 2010a). In the 1980’s, DiMaggio’s findings indicated that the cultural activities pursued by girls at secondary school had a beneficial effect on their academic performance. Presumably, activities preferred by boys play a role in their later success in the labor market.

DiMaggio (1982) holds the view that abilities and family background in isolation have little influence on school grades, while students’ cultural capital has a greater effect. He found that in non-technical subjects, the effect of cultural capital exceeded that of measured abilities in certain student groups. Bourdieu (1973) claims that students are rewarded at school based on their cultural capital. As girls have significantly more cultural capital at secondary school and in the first years of higher education, this can be the cause of their better performance. DiMaggio’s results from the 1960s show that in the USA, cultural capital had a strong effect on the grades of girls whose parents were highly educated (this was in line with the cultural reproduction model) and on the grades of boys whose parents did not have high educational attainment (in line with the cultural mobility model). It is important to note that DiMaggio only examined students’ own cultural resources and ignored those of parents. Dumais (2002) is also of the opinion that cultural capital has a detectable positive effect on girls’ achievement, whereas the same effect is much smaller for boys. Girls’ more intense cultural activity is also due to traditional gender roles, and they are more likely to be stimulated by cultural capital to do well at school.

SUMMARY

The study of women’s position in education is an important area of the sociology of education including fields such as segregation by gender,

gender differences in motivation for entering higher education, boys' and girls' performance at school, etc. Some researchers argue that women have already achieved equality in education, so there is no need to study this area any further. We believe that there are still many questions to be answered, and the necessity for research is evidenced by the large body of international research addressing gender disparities in education. In this chapter we have pointed out that there is status inconsistency between women's educational attainment and labor market position. Women are at an advantage in education and at a disadvantage in the labor market. The latter suggests that women's education yields lower returns.

Women's participation in education gradually reached men's rates, and by the 1980s, women in secondary and higher education had outnumbered men in many developed countries. After the 1980s, the proportion of women continued to rise and, by now, their disadvantage has turned into an advantage regarding their presence in education. We have observed that boys show less school mobility in both secondary and higher education, and so their participation depends on the quality of their background (see the "male disadvantage hypothesis"). Regarding girls, the relationship between their educational attainment and later status is not so direct as for boys. Therefore boys' lesser mobility is true only in an educational context as their real social status might be much higher than that of girls with similar qualifications.

In addition to headcount, school mobility, and participation in "high culture", girls' advantage extends to performance at school. In primary education, girls' learning techniques are more efficient, and in addition, they are more disciplined and hardworking, which yields better learning outcomes. They also perform better at secondary schools (especially in non-vocational ones) despite their less favorable backgrounds, as is shown by their higher GPAs, more ambitious plans for higher education, increased participation in competitions, etc. Their advantage is still present at the point of entry into higher education as more of them continue their studies, and they also have better school-leaving exam results, as well as more language skill certificates. During the years of higher education study (second stage) however, men gradually take the lead in some respects e.g., participation in student research competitions, publication, attending colleges of advanced studies, and doctoral aspirations, which forecasts their more successful labor market performance (third stage), especially in academic careers. Once boys enter higher education (not having "got lost" in vocational education), they are more likely to aspire for PhD programs and careers in research.

Girls' disadvantage in education is still reality. The influx of women into higher education may gradually lead to the declining prestige of secondary-school graduation and higher education degrees. Vertical and horizontal segregation in education still add to women's disadvantage. Horizontal segregation means that women study in fields which do not have high value in the labor market; vertical segregation means that the proportion of women is lower at the highest levels of education (university faculty and researchers), which is a further cause of women's lower remuneration. In the section on horizontal segregation, we have pointed out that "feminized" degree programs (where the proportion of female students is above average) prepare students for professions that have lower prestige and offer lower salaries.

In summary, there are still some areas in education where women are at a disadvantage, for example because of horizontal and vertical segregation, but now they have an overall advantage. We have observed that women are in the majority in general secondary and higher education, their overall performance at secondary schools is better, they have more cultural capital, and higher social (school) mobility. However, men's better performance in certain areas of higher education forecasts their greater success in the labor market.

QUESTIONS AND TASKS

1. List women's advantages and disadvantages in education. Provide a short summary of women's disadvantage in the labor market.
2. Explain how gender roles have changed and elaborate on how gender socialization influences gender role attitudes.
3. Explain how horizontal and vertical segregation is present in education and how it affects each sex.
4. What is known about boys' and girls' performance at school and what are the causes of girls' better performance?

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Resilience and compensating factors

The performance of education systems and institutions is at its highest when the subjects of observation are students whose prospects are far from promising at the time of entry. If these students perform well, they are described as resilient. This chapter introduces the concept of resilience and its theoretical framework as used in the sociology of education. We demonstrate the use of the term 'resilient' to describe teachers as well as students. We also present the risk factors, performance indicators, and protective factors that characterize successful student paths despite a disadvantaged start.

Key concepts

Resilience: "Resilience is a universal capacity which allows a person, group or community to prevent, minimize or overcome the damaging effects of adversity" (Grotberg 1996).

Resilient students: Students whose academic performance is excellent despite their socioeconomic disadvantages (Ceglédi 2018). Within international literature, resilient students are defined as those whose social background is in the lowest tercile or quartile, but whose achievement is in the highest one.

Resilient teachers: There are four approaches to this concept. 1) A teacher is resilient if they develop their students' resilience and play a key role in resilient life paths. 2) A teacher is resilient if their own life path shows traits of resilience. 3) A teacher is resilient if their work is characterized by professional resilience. 4) A teacher is resilient if they experience their professional self as a resilient personality.

Springboard effect: The ascension of life paths despite initial adversity (e.g., attaining a high level of education in the face of social or regional disadvantages). The name stems from the symbolic similarity between the description above and a springboard swinging upwards from deep below (Ceglédi 2018).

"Bounce back" effect: The adversities resilient students are faced with bounce back from them and make them capable of adapting to continuous challenge (Kapitány & Kapitány 2007; Sugland et al. 1993).

DEVELOPMENT-FOCUSED RESILIENCE IN THE SOCIOLOGY OF EDUCATION

resilience This chapter introduces readers to the concept of **resilience**,⁸ which is borrowed from the terminology of psychology and child welfare to describe a sociological phenomenon. Students are considered resilient if they perform well at school when, initially, one would expect poor performance based on their social background (Ceglédi 2018). We give an overview of the existing explanations of successful academic paths in the face of disadvantages. Doing this, we hope to help teachers who try to promote the careers of their students with similar backgrounds in a resilient way.

The word resilience originates from Latin, where the verb “resilire” means to ‘bounce/spring back, swing up’. Thriving in the face of adversity, exceptional reactions to some hindering factors – this is how the European scientific discourse uses the term, referring to the resilience of people, communities, organizations, or systems (Le Duc 2015; Ceglédi 2018; Békés 2002; Homoki 2016).

Resilience is defined as “the capacity of a system to adapt successfully to disturbances that threaten the viability, function, or development of the system” (Masten 2019, p. 101). This implies that resilience is more than the lack of negative consequences. Focus has shifted to positive results and solutions, which could be of great practical importance in the field of child welfare, social work, and schools (Homoki 2016; Bacskai 2015; Ceglédi 2018). The **development-focused approach to resilience**, which prefers using the word ‘changes’ rather than ‘difficulties’ and finds potential for development in every change, can be extremely helpful to educators’ work. It claims that coping with adversity can lead to a new, higher level of balance (Masten 2019; Le Duc 2015; Ceglédi 2018). It is vital for disadvantaged students to receive sufficient help to benefit from, rather than be harmed, by their struggles. The person who is to stand by the student in such situations is the teacher.

**development-
focused approach
to resilience**

RESILIENT STUDENTS

In the English-language literature, students who perform well against all odds are described as resilient or invulnerable, with these two terms

⁸ This chapter is a revised version of certain chapters of the author’s monograph (Ceglédi 2018).

often being used interchangeably (Alva 1991; Perez et al. 2009). During the analysis of **PISA tests**, resilient students are defined as those whose social background is in the lowest tercile or quartile, but whose achievements score within the highest one (OECD 2011, 2016; Agasisti et al. 2018).

PISA tests

The concept of resilience, on the one hand, helps to identify the features of resilient students and detect the phenomenon of succeeding academically in the face of disadvantages. On the other hand, apart from the mere identification and description of resilience, science aspires to find out about its background and about how best practices could be applied more widely (e.g. Homoki 2016).

The literature on the sociology of education frequently adopts the perspective of academic resilience (Celik 2017; O’Shea 2020; Wong & Chiu 2019; Ceglédi 2015, 2018; Máté 2015; Homoki 2016).

literature on the sociology of education

By unfolding the concept, we try to show how different approaches to resilience can help to find answers to the questions of contemporary education.

One of the narrowest interpretations of resilience is applying the term to any well-motivated student with high self-esteem, regardless of whether these qualities have developed in the face of a disadvantage, e.g., an unfavorable social background (Waxman et al. 2003).

A more complex meaning is attached to resilience in the European scientific discourse, where it denotes ‘flexibility’, ‘resistance’, and, most frequently, it is used as a synonym to ‘succeeding in the face of adversity’. This means that resilience is an exceptional phenomenon that occurs despite a hindering factors. The same approach is reflected in the definition of the **International Resilience Project**: “Resilience is a universal capacity which allows a person, group or community to prevent, minimize or overcome the damaging effects of adversity” (Grotberg 1996).

International Resilience Project

RISK FACTORS AS COUNTERPOINTS AND THE SPRINGBOARD EFFECT

The simple interpretation of resilience (in which it is grounded in positive behavior) can be made more granular by examining the nature of **adversities** and whether individuals, groups, and communities react to all adversities in a similar way. Sameroff (2005) states that resilience, i.e., success despite adverse circumstances, is a complex concept without a single, universal interpretation. He presumes that there are different coping strategies to every instance of the enormous range of challenges in life, but certain risk factors can still linger on low self-esteem, uncertainty

adversities

about one's lifestyle, being unmotivated to continue into higher education, etc. Sugland et al. (1993) point out that different life stages can be characterized by different forms of coping skills. Consequently, resilience is a more complex phenomenon than positive inner behavior. Apart from capturing its inner complexity, the investigation of resilience should also focus on environmental factors as well as students' reactions to them.

"According to the bioecological model, favorable circumstances can realize the potential of most innate abilities. By contrast, in a disadvantaged socio-economic and cultural context, the majority of inherited abilities remain unexploited because of weaker and less efficient close relationships" (Szilvási 2005: 71). Individuals with favorable inherited characteristics are more capable of shaping their environment, while those who live in unfavorable circumstances are less likely to realize their innate abilities. If families struggle to survive on the daily, they have no more time and energy left for fostering their development and maintaining their close relationships (Szilvási 2005).

environmental
risk factors

In line with Sugland et al.'s (1993) classification, **environmental risk factors** can be divided into two groups. Firstly, there are major stressful life events during one's course of life, referred to as crises. Secondly, there are minor stressors that are constantly present in everyday life. The authors state that everybody faces both crises and minor everyday problems (such as detachment from parents, a new school environment, illness, etc.) They claim that the frequency of these events and individuals' responses to them are socially determined. Children at the bottom of the social hierarchy experience the accumulation of unexpected events, and everyday stressors therefore have a more serious impact on them. Children's school careers can be impacted by stressors such as divorce, unemployment, criminality, financial problems, war, terrorism, natural disasters, maltreatment within the family, torture, fires, being orphaned, family crises. (Sugland et al. 1993; Masten et al. 2008; Engler 2020; Alwin & Thornton 1984). Masten et al. (2008) point out that risk factors hardly occur one at a time but rather in unique combinations, accumulating and strengthening one another's effects.

Nevertheless, why are there still students from these social strata who are unaffected by risk factors, at least when it comes to their school careers?

Research has shown that children who are affected by one or two risk factors behave differently from those for whom risk factors accumulate or are more severe (Waxman et al. 2003; Sugland et al. 1993). In Alwin and Thornton's (1984) view, constant disadvantages, critical periods,

and accumulated difficulties all have different effects. The influences experienced in highly sensitive early life stages, for example, will have permanent consequences for later development (Alwin & Thornton 1984; Bernstein 2003; Boudon 1974; Pusztai 2015). Alvin and Thornton (1984) also call attention to the fact that the term ‘permanent family effect’ should be used with caution, as the role of the family changes constantly.

Risk factors can be looked upon as tools for coping. It is possible for resilience to develop because of, rather than in spite of, adverse circumstances. Both a very favorable and a very unfavorable family background can promote social success. The positive effect of adverse circumstances can be described as the **springboard effect**: the lower one starts from, the higher the springboard shoots them up (Ceglédi 2018). The name stems from the symbolic similarity between the springing board bouncing up from below and getting high in one’s life despite a life path full of adversity.

springboard effect

It is indispensable for resilient people to admit to having traumas and be willing and able to work on them and ask for help to cope (Máté 2015). Factors that untie the bonds holding the springboard deep below must be identified. One such factor, for example, is the encouragement of cultural activity, the most responsive to which are those whose parents have not even completed primary education (Blaskó 2002), but the cultural capital of denominational schools also have an ‘untying’ function (Pusztai 2015).

COMPENSATING FACTORS

The effect of risk factors can be neutralized by those positive, **compensating factors** that are instrumental in coping with adversity. Researchers unanimously distinguish between two types of compensating factors: external/environmental and internal ones (e.g. Sameroff 2005).

compensating factors

The most important skills serving as internal sources of resilience are “opening up to the outside world, control of emotions and impulses, realistic optimism, causal analysis, empathy and self-efficacy” (Nemes 2010: 7). External sources include a caring family, a tolerant peer group, a suitable school, the neighborhood as a community, and financial resources (Sameroff 2005). Most researchers underline the primary role of external factors (e.g. Sameroff 2005; Pusztai 2015).

Masten et al. (2008) and highlight the significance of **schools**, as they often provide the first opportunity for children to encounter an intellectual environment through teachers or equipment that disadvantaged children hardly have access to at home (e.g., musical instruments, sports

schools

equipment, books, electronic communication devices, etc.) Moreover, several researchers of resilience regard schools as the primary setting where protective factors are present and general adaptive systems are shaped (Masten et al. 2008; Kapitány & Kapitány 2007). Masten et al. (2008) hold the view that schools are places where protective and risk factors exist side-by-side, which they consider ideal since children can undergo negative life events and develop their coping strategies under supervision. It is crucial to have people in schools who keep track of children's lives and can intervene as experts in hazardous situations. Schools can thus act as doses of "inoculation" in the development of successful adaptation (Masten et al. 2008).

Research that emphasizes the primacy of the environment is also spurred by the expectation to provide easy-to-use recipes to schools, parents, or peers for strengthening resilience (e.g. Sugland et al. 1993).

The individual's good performance itself can be looked upon as a factor compensating for adverse circumstances. It has been found at various levels of education that in making decisions on one's further education, good performance can override – or at least diminish – the effect of unfavorable family background (Boudon 1974; Vergolini & Vlach 2016; Lannert 2004). As for the impact of grades, however, Lannert does not draw attention to compensation but to the fact that the lower a student's status, the more sensitive they are to the information conveyed by grade points, and they only choose to continue in a demanding secondary school if it is not too risky regarding their performance.

environmental
resources

Békés states that resilience is not only rooted within individuals but that **environmental resources** are also of equal importance. "Resilience is an ability to thrive, mature and grow in competence in the face of adversity. Adverse circumstances can include biological disorders or environmental defects, and they can be chronic and frequent or severe but infrequent crises. In order for individuals to succeed, thrive, mature and grow in competence, they have to mobilize all their resources, whether they are biological, psychological or environmental" (Gordon's interpretation of resilience, cited by Békés 2002: 221).

Waxman et al. (2003) are also in favor of treating internal and external factors together. Rutter examined the children of parents with mental disorders and found that both a supportive school environment and strong personality traits serve as protective factors (cited by Waxman et al. and Sugland et al. 1993). In a longitudinal study on a cohort whose members were born in 1955, one third was classified as belonging to

a high-risk group (e.g., born into poverty and struggling with several other hardships as a result), of whom every third became a well-achieving, responsible adult. Their success had three key elements in common: innate personality traits, a loving family, and an external support system in their environment (Waxman et al. 2003). Garmezy also divided protective factors into three groups: children’s personal traits, family characteristics, and external support (cited by Sugland et al. 1993 and Henderson 2007).

Next, we will turn to discussing the relationship between external and internal factors.

Masten et al. (2008) call attention to the dynamic relationship between external and internal factors. They claim that coping with a challenge successfully is the joint result of **external and internal adaptation**. Sugland et al. (1993) emphasize the procedural nature of adaptation and the dynamism of coping with adversities. It is especially important to be strengthened by protective factors (encouragement by teachers, family, and friends) at times of crisis, but their permanent presence in one’s course of life is also indispensable. Masten et al. (2008) claim that in addition to continuity, it is also necessary to apply multiple supportive strategies simultaneously. The authors raise the question whether it is more prudent to prevent hazardous events or to teach children how to cope with them. All things considered, they find prevention more “profitable” but still insist that everybody must face a certain degree of challenge in their lives and be trained by overcoming minor difficulties. The best option is to undergo these experiences under supervision in a supportive environment. Children should be helped to avoid “rolling” the hardships experienced in front of themselves like a snowball, as the authors put it. Crises experienced under supervision are easier to get over and can serve as a vaccine against more serious adversities in the future.

external
and internal
adaptation

The dual nature of compensating factors evokes associations with John Henryism, a phenomenon that was named after an African American. Although he managed to overcome his social disadvantages, his struggles consumed all his inner resources, destroyed his health and, eventually, led to his death. Research evidence suggests that men with similar life courses are susceptible to high blood pressure (Subramanyam et al. 2013).

Research has revealed that a school career which is successful despite social disadvantages – in other words, is resilient – originates in the combination of personal traits and environmental factors (Waxman et al. 2003). The most successful manifestation of **the dynamic relationship between internal and external factors** is when individuals are naturally inclined to mobilize external reserves around them. Masten et al. (2008)

the dynamic
relationship
between internal
and external factors

find this only possible if the adaptive systems that provide promotive and protective factors such as family, school, and peer groups, operate in a healthy way. These systems empower individuals to have immunity and to be able to mobilize their reserves in case of emergency. The authors point out that adaptive systems have come into being in the natural course of human development as outcomes of mechanisms created and transmitted by biological and cultural evolution, and it is evident that they are available to individuals as resources. This interpretation implies that resilience is not an exceptional phenomenon but “ordinary magic” (Masten et al. 2008; Kapitány & Kapitány 2007). Individuals can make use of everything around them to adapt – everything that, by virtue of any of its features, can be incorporated in their adaptive techniques. (These elements can even be contradictory, e.g., some challenging situations require the incorporation of the advantages of a rural lifestyle, while others benefit from an urban way of living) (Kapitány & Kapitány 2007).

It is to be noted that in most cases, one does not become resilient in isolation but as a member of a **community** (e.g., family, school class, residential, or other forms of community) (Homoki 2016; Máté 2015). The most important community is perhaps the family. Research on family resilience has found that resilience is determined by the dynamism of the family’s operation. A family’s resilience is enhanced by empowering belief systems, family cohesion, open communication, problem solving, and flexibility. Coping with divorce, for example, is eased by feeling parental love (Homoki 2016). This view of resilience is compatible with Coleman’s (1988) concept of social capital, which also exists within the family. Its amount and character influence children’s education. Whereas human capital in the family can be measured by parents’ level of education, family social capital incorporates the relationship between parents and children. This is how children gain access to their parents’ human capital – through parents’ presence in the family and the fact that parents devote a lot of time and energy to their children’s development.

In schools and classes which offer a favorable environment, even disadvantaged students can obtain the necessary amount of social capital, which fills them with motivation and ambition to continue their education and social advancement. In this case, social capital has a compensating effect instead of its usual reproductive role (Blaskó 2002; Pusztai 2015; Lannert 2004). However, it is highly doubtful whether all talented students find their way to such secondary schools and classes.

RISK AND COMPENSATING FACTORS AS FUNCTIONS OF SOCIAL POSITION

The authors cited above hold the view that the quantity, quality, and incidence of risk factors in one's course of life is influenced by **social position**. This leads to the conclusion that the quantity and utilization of compensating factors are also dependent on one's position in the social hierarchy. Kapitány and Kapitány (2007) argue that people of high social status have a wider range of resources at their disposal, and the hierarchical structure of society in terms of material wealth, power, and knowledge is also reflected in the success of coping, leaving disadvantaged groups with much fewer means for adaptation. Moreover, the mere act of facing the divide between certain strata of society may discourage the individual (Reay et al. 2009; Haficová et al. 2020).

It is only possible to overcome crises if protective systems (family, school, religious and cultural communities, peer groups, etc.) do not weaken or cease to exist (Masten et al. 2008). Although in the lower strata of society adaptive systems are more vulnerable, a certain form of adaptation to circumstances is still capable of developing. Each social group works out their own **strategies for coping** which are the most efficient under the given conditions (Kapitány & Kapitány 2007). Each group has their own recipes suitable for developing the adaptive strategies to their problems, which results in a varied and stratified pool of strategies in society, elaborate enough to serve the needs of each group. If the rigid barriers between certain groups start to loosen and one enters another group, one can adopt the existing adaptive strategies of the new group, gaining a new strategy without the effort of developing a new one or the risk of losing an already established one (Kapitány & Kapitány 2007). However, our interviews with resilient students (Ceglédi 2018) failed to give consistent information on "dual adaptive strategies". On the contrary, the interviews suggested that students in their new environment still recognized and appreciated those strategies that they were already familiar with (e.g., they appreciated the lecturer's honesty when they admitted not knowing something or they admired the persistence of their peers) (Ceglédi 2018).

Another way in which social position can influence coping strategies is that those on top of the lower strata (as opposed to those at the bottom) are more confident, make better use of the resources available to their group, and cope with their difficulties more easily (Kapitány & Kapitány 2007). This hypothesis has been confirmed by interview studies (Ceglédi 2018).

Atypical family or environmental conditions can also account for resilience in the lower strata of society. Atypical family conditions include positive expectations regarding further education, atypical language skill development, and aspirations for anticipatory socialization. Atypical environmental conditions are evidenced, for example, in social networks outside a school with abundant cultural and social capital, or a school climate that promotes the careers of aspiring individuals (Blaskó 2002; Pusztai 2015).

the individual's
autonomous
decisions

Among the explanations of success in the face of disadvantages, it is worth mentioning a theory which holds that, at higher levels of the educational hierarchy, the effect of social position gradually diminishes and is taken over by the individual's autonomous decisions and other communities (Pusztai 2015; Alwin & Thornton 1984; Ganzeboom et al. 1991; Beck 1983, etc.). Our research did not support this theory as the resilient students we interviewed 1) were admitted to degree programs of relatively low prestige; 2) carried their day-to-day financial problems and their deficiency in social and cultural capital to higher education; and 3) typically met curricular requirements conscientiously owing to family patterns but were unable to exploit all the intellectual possibilities of student years, so they suffered disadvantage again (Ceglédi 2018).

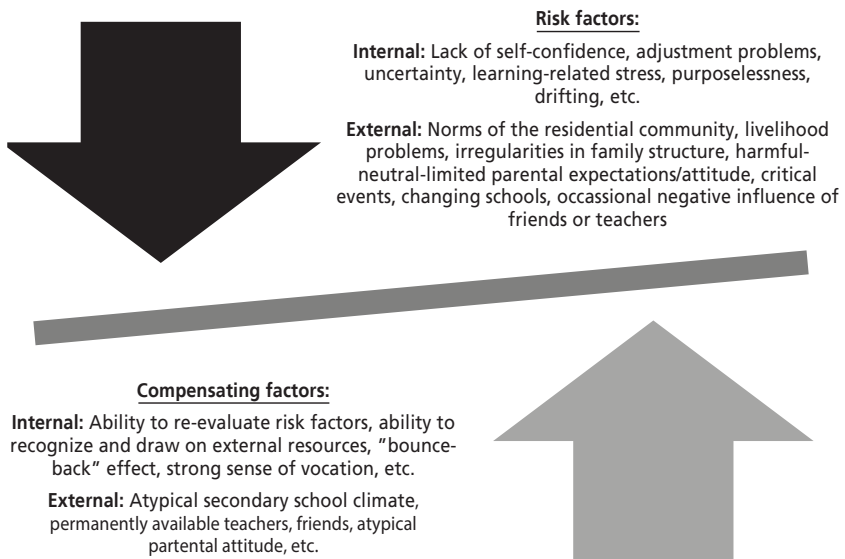


FIGURE 2. Risk factors and compensating factors in students' narratives

Source: Ceglédi 2018

The literature points out that disadvantaged students can accumulate several personality traits that are predictive of successful adjustment. While high-status students are more likely to develop leadership, political, and abstraction skills, their low-status peers become resourceful and resistant owing to their daily struggle for survival, and because of the “bounce back” effect, difficulties bounce back from them, making it easier for them to adjust to continuous challenge (Kapitány & Kapitány 2007; Sugland et al. 1993). survival

The validity of the “bounce back” effect was confirmed by our research since our respondents were able to recognize and exploit the compensating factors available in their environment (Ceglédi 2018).

Challenges can only promote the development of adaptive strategies if the disorders caused by social disadvantage only prevail temporarily and to such an extent that triggers coping as opposed to giving up (Masten et al. 2008; Kapitány & Kapitány 2007). In resilient students’ lives, compensating factors carry more weight than risk factors. If the joint effect of compensating factors is stronger than the joint effect of risk factors stemming from social position, a student can be regarded as resilient. With the help of the above classification, based on qualitative research among resilient students, Figure 4 visualizes how compensating factors outweigh risk factors. weight

Although the dominance of compensating factors is obvious in resilient life paths (Ceglédi 2018), it is still to be noted that the factors that are meant to compensate might appear as risk factors in some students’ lives (e.g., a hindering family or faculty member, friend, etc.). However, they are not likely to produce any effect because of their sporadic occurrence and weakness compared to compensating factors, and because students try to combat them and are able to use them to their advantage.

RESILIENT SCHOOLS, RESILIENT TEACHERS

A resilient school fosters a school culture that gives the chance of success to students who have initial disadvantages. A traditional school organization can be renewed through reculturation, a process during which the school community, primarily the teaching staff, by reviewing and rethinking their educational goals, formulate and put into operation new values and supportive norms so that they penetrate the entire organization. Resilient teachers can only work effectively as members of a cooperating teaching community (Agasisti et al. 2018; Bacskai 2015; Fullan 1995; Hargreaves et al. 2005; Hemmings 2012; Wellensiek 2014). resilient school

resilient teacher The concept of the **resilient teacher** can have several interrelated meanings.

1. A teacher is resilient if they develop their students' resilience and play a key role in resilient life paths.
2. A teacher is resilient if their own life path shows traits of resilience.
3. A teacher is resilient if their work is characterized by professional resilience, meaning that a teacher does not need to have a resilient life path in a sociological sense (i.e., obtaining a degree despite social disadvantages) to be resilient in their work. Life experience can have resilient characteristics regardless of social background.
4. A teacher is resilient if they experience their professional self as a resilient personality.

QUESTIONS AND TASKS

1. Elaborate on the meaning of resilience in education studies.
2. Characterize resilient teachers.
3. Present the risk factors in life paths which are successful and resilient despite their disadvantages.
4. Analyze a student career in which the springboard effect can be detected.
5. Compare the external and internal sources of resilience.

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COMMUNITIES INVOLVED IN EDUCATION

Family communities

Family communities are the cornerstones of society. Consequently, a society can fulfill its potential only if its building blocks function adequately. This chapter introduces readers to the concept, functions, and operation of the family unit from the perspective of socialization since the family is the primary agent of socialization. The relationship between the primary and secondary agents of socialization (the latter of which is education in institutions) is of utmost importance because successful integration into society depends on the efficient cooperation between schools and families. The conditions and ways of their cooperation are discussed at the end of the chapter.

Key concepts

Family: The smallest unit of society, and the primary agent of socialization, in which individuals acquire the essential rules and norms necessary for integration into society and for adult life. The character, structure, life cycle, and functioning of families largely depend on the specific society with its economy, culture, and historical background. The patterns, values, and norms received in the family determine one's entire course of life.

Socialization: In a general sense, it means individuals' integration into society, i.e., the internalization of norms and values indispensable for efficient participation in the life of the community. The primary agent of socialization is the family, followed by the secondary socialization which occurs in educational institutions and the workplace, which are important environments of socialization. Lack of adequate socialization may easily lead to marginalization and consequent problems such as unemployment, depression, alcoholism, etc.

Parental career: The process of becoming a parent. It is referred to as a "process" because a childless person can never claim to be fully prepared for fulfilling the role of a parent. Neither can parents who are currently bringing up children state that they have reached perfection in parenting. Following their children's development and the family's life cycle, parents continuously adjust their parental attitudes, goals, and techniques, drawing

on their experiences and heritage. The goal is to master parenthood fully and as efficiently as possible.

School career: Students' performance and achievement at school, as well as their integration into the community. The course of one's school career is greatly influenced by one's family background. In primary and secondary education, which is the beginning of one's professional career, students' advancement is significantly affected by the kinds of capital their families possess. Due to the strong influence of social and family background, it is difficult to achieve the equality of opportunities in students' school careers. Several efforts are made to eliminate inequalities, for example there are integration programs, remedial teaching, and talent development.

Preparation for family life: Preparation for the roles and operation of family life including building and maintaining romantic relationships, acquiring the roles of husband/father and wife/mother, managing family finances, leading a healthy lifestyle, etc. Traditionally, all those patterns were provided by the family, with various members passing down the necessary knowledge and skills. However, radical changes in family structure (e.g., nuclear families instead of multigenerational ones, the absence of male roles because of divorce) have resulted in the fact that knowledge and competencies are not always handed down in the family. As such, external help is needed. While role models inside families are passed down informally, institutional preparation for family life is well-planned and organized. Preparation for family life can take place at school (by addressing the topic of families in class), in healthcare (through sex education and courses held by maternity nurses), in a church (by marriage preparation courses), and in NGOs (by couples counselling).

THE CONCEPT OF FAMILY

The concept of family is approached in unique ways by different disciplines. What the various definitions have in common is that **the family is the smallest unit of society**, and the primary agent of socialization, in which individuals acquire the essential rules and norms necessary for integration into society and for adult life. These norms, values, and rules vary in time and space (by continent, country, and even region), so it is best to refer to them as values of a certain society or culture. Families are dynamic and ever-changing entities themselves, teaching different things to the generations of their members in their different life stages and circumstances.

The **role of family in socialization** includes giving care, creating a sense of security, teaching to speak, and providing a model. It is also the family that provides the first framework for interaction and identity

the family is the
smallest unit
of society

role of family in
socialization

formation (Kozma 1999). Structurally, we can differentiate nuclear families, in which two generations (parents and children) live together, and multigenerational (extended) families, which consist of more than two generations in one home, i.e., grandparents and great-grandparents in addition to parents and children. If biological parents get divorced, and one of the parents continues to raise the child(ren) on their own, the result is a single-parent family, and if the parent is joined by a new partner and they raise the child(ren) together, the new formation is called a patchwork family, which can also include the new partner's children from their former relationship, and new children born into the patchwork family.

The existence and proper functioning of families are in the interest of both individuals and society. Children who grow up in harmonious, loving families will possess social competencies that provide a solid foundation for a healthy adult life, relationships, a positive outlook on life, and work morale. People with adequate self-knowledge and emotional competencies will be productive members of the workforce and useful members of society. Kopp et al. (2011) refer to good familial relationships (between husband and wife, parent and child) as factors protecting health. This prevents the social security system from being overburdened, as people from healthy families have stronger immune systems, are less prone to mental health disorders, more likely to avoid addictions, and less likely to suffer from depression or self-harming thoughts.

STAGES OF FAMILY LIFE AND CHILD-REARING

Families are not static entities but dynamic systems undergoing constant change. Changes can originate from the family itself, for example the birth of a child, disease, death, or changes stemming from the children's growth. External impulses which cause the family as a system to adapt may come from work (e.g., changes at the workplace, job losses, a family member returning to working life), geographical mobility (e.g., moving house, commuting), and from the communities surrounding the family (e.g., formation or dissolution of microcommunities, changes in conditions of membership).

These changes compel families to adjust permanently, altering their old habits and fixed patterns. If families are unable or unwilling to do so, they will realize that their old solutions will not work under the new circumstances. At transition points of the family life cycle, the need for alteration always arises. Transitions are often marked by certain customs and rituals such as weddings, christenings, or periods of mourning.

family life cycle

There are different divisions of the **family life cycle** (e.g. Hill & Rodgers 1967; McGoldrick & Shibusawa 2012). The first stage is usually the one without any children, and the second stage begins when the first child is born and also includes the period while the children are young, followed by a period of school-age children and that of adolescent children; the next stage is the time of when grown-up children leave the home, and finally, the stage of the couple left by themselves. Each stage requires a different kind of child-rearing style and care from parents, which in turn brings about a change in parents' roles and relationship as well. Each stage has its own challenges and stumbling blocks, such as the impact of the first child's arrival on a couple's relationship and everyday life, or the "empty nest syndrome", when the relationship must be built on new foundations.

CHILD-REARING IN THE FAMILY

parental career

The **parental career**, or becoming a parent, is a process that is usually experienced without much consciousness and prudence, although the quality of parenting, as it will be pointed out, influences several aspects of a family's life.

Changes in family development can cause considerable stress within the family unit. Although becoming a parent is a natural stage of the parental career, it still often catches young couples unprepared. Gage and Christensen (1991) found that couples who had received preparation for parenting, either formal or informal, were significantly less likely to go through negative experiences after their first child's birth. They more often reported feeling confident, joyful, relieved, and satisfied while taking care of their babies. This, on the one hand, had a positive effect on their relationship but, on the other hand, it was the relationship that charged the couple with sufficient energy, since mutual help was more common among such couples.

Socialization to prepare for parenthood can include babysitting relatives' or friends' children, discussing child-rearing and childcare with them, reading and watching relevant content, consulting experts (doctors, maternity nurses), or simply observing the lives of young families with children. One third of Gage and Christensen's (1991) respondents mentioned the importance of formal socialization in avoiding the stressful situations of initial parenthood. At preparatory courses, would-be parents are instructed by experts who help them acquire father and mother roles. They help with specific questions about caregiving and child-rearing, as well as with the formation of parental identities. This implies that

socialization for parenthood also has a preventive function, insofar as it helps new parents protect their mental health by preparing them for stressful situations which occur around the arrival of a baby (e.g., excessive anxiety, nervousness, self-accusation, communication disorders, and declining self-confidence). These stressors not only hinder couples in successful parenting, but also endanger their relationship, which might lead to the family falling apart. In other words, the birth of a child may easily be the cause of the deterioration of relationships, which is confirmed by Hungarian statistics: 40% of divorces occur in the first ten years of marriage, and 60% of divorces affect one or more children. Partnerships other than marriage fall apart even more readily.

The arrival of a baby in the family affects both partners at the same time. Carbonneau et al. (2019) found that couples who were equipped with constructive coping strategies proved to be the best at meeting the challenges. The partner's support was instrumental in tackling problems successfully, in a similar way to other transitional or critical situations. In Csikszentmihályi's (1999) view, the key to a balanced family life is open communication channels, i.e., parents are recommended to discuss their daily tasks, problems, successes, and failures, or even their desires. These communicational situations teach children to think and come up with arguments. If parents are always absorbed in their work or the television and fail to talk, their children will find other partners to communicate with.

Umberson et al. (2010) consider the same question from the perspective of the entire life cycle. When describing the impact of having children on parental well-being, they separate the stage from the child's birth to young adulthood from the stage of having adult children. In the former stage, the highly intense involvement in giving care allows couples lower levels of well-being, but, in later stages, previous investments seem to yield their return. Taking parental well-being into consideration, they believe it is best to have one's first child between the ages of 23 and 30.

There is a strong link between attachment in early childhood and the **parent-child relationship** one develops with one's own children. Parents who experienced secure attachment in their childhood typically develop similar relationships with their children, while, for example, mothers who experienced little attachment and were neglected keep a distance from their own children as well (Steel et al. 1996; Volling et al. 1998). The symbiosis between mother and child generates the primal trust which determines the child's future relationships and ability to trust, whereas the lack of symbiosis results in incapability for feeling trust. Problems

parent-child
relationship

and crises are survived by families in which relationships are based on unconditional trust and acceptance (Balog et al. 2008). Vandeleur et al. (2009) confirm that children who grow up in families providing strong emotional attachment can also profit from the balanced and secure atmosphere of their homes in other areas apart from emotional well-being. Children brought up by parents who have a stable relationship have been found to have remarkably fewer disorders in their academic performance, behavior at school, and relationships with peers.

children's physical
and mental
development

The family atmosphere, shaped by the relationships between its members, has an impact on **children's physical and mental development**, academic performance, socialization, and identity. It is as important an influencing factor in childhood and adolescence as classic socioeconomic background factors (see Croll 2004; Brown 2006; Acs 2007; Vandeleur et al. 2009; Boreczky 2015; Bocsi et al. 2019; Bocsi & Ceglédi 2021). Children who grew up in families with strong cohesion scored much higher on well-being indices, and a strong attachment between parents and between parents and children proved to be a strong protective factor especially for adolescents (Vandeleur et al. 2009). Therefore, it is essential to measure the well-being of parents who are raising the young generation and find out how they can create a favorable environment for them.

By analyzing a series of interviews with 11,200 adolescents, Brown (2006) examined the behavior, emotional features, and academic engagement of interviewees who came from diverse family backgrounds. It was children living in two-biological-parent families who had to cope with the fewest problems in all three respects. The worst indicators were significantly associated with cohabiting stepfamilies (one biological and one stepparent); the results were somewhat better if it was a married stepfamily. The study, which was conducted in two waves, clearly showed that an unfavorable transition in family structure, such as divorce, remarriage, or death, led to a considerable decline in adolescents' behavior and academic performance (most prominently depression, delinquency, and lower engagement in school). The reason for the decline was an insecure family background. However, the stepparent's marriage into the family increased children's well-being to a certain extent.

Acs (2007) studied parents' relationships in order to detect the effect of different family structures on children's performance and well-being. He examined the three areas of cognitive achievement, school engagement, and behavioral characteristics. The analysis of the sample comprising 31,128 children aged 2-11, observed between 1986 and 1998, indicated a close association between certain relationship types and children's

development (Acs 2007, 1326). In all three areas, the best results were achieved by children living with their stably married, biological parents. In mathematics and reading comprehension, children from single-parent families were outperformed by students who lived with only one biological parent (cohabiting) and by those whose biological parents' marriages had become unstable. It is interesting to note that there was smaller variation in performance among children from married families, regardless of the stability of the marriage, than among children from married vs cohabiting, married vs single, or cohabiting vs single families.

The association between **family structure and school performance** is to be considered from the perspective of Coleman's (1988) theory, which holds that the different forms of capital possessed by parents can be utilized by their children only if there is sufficient social capital within the family. Families undergoing structural change, or complete but malfunctioning families, suffer losses of capital. Divorce leads to a loss of capital, and if there are long-lasting problems within the family, the adequate flow of capital is hindered. Paying proper attention to children and high-quality communication in the family are indispensable for passing down cultural and external social capital (Coleman 1988; Crosnoe 2004; Parcel et al. 2010; Pusztai 2015; Pusztai 2018).

family structure
and school
performance

Croll's (2004) theoretical work reveals some practical aspects of the above. In his view, families participate in society partly as strategists when they make decisions concerning their children (e.g., choice of school), and partly as mentors. His discussion of the latter role involves references to adequately accumulated and transmitted capital, manifested in the support of children, providing guidance and advice to them, and mediating between the school and their children's work. Supportive parents emphasize the values of the school, manage their children's school careers, and take an active part in school life while maintaining well-functioning communication channels at home.

These ideas by Croll (2004) offer an innovative approach to the concept of social capital, revising and completing existing theories. Bordieu (1983) claims that social capital is available to people of prestigious status, who are driven by self-interest to accumulate it. In Coleman's (1988) interpretation, social capital is accessible to everyone and serves the public interest, but the indicators he uses have their focus inside families: they refer to two-parent families in which the mothers stay at home and discourse on children's education takes place within the family. Croll (2004) expresses his criticism of Putnam (2000), who finds sources of social capital outside the family (e.g., volunteering, political activity).

Instead, Croll (2004) attaches importance to socio-economic status and external factors in his investigation, but finds parental communication directed into (and out of) the family, as well as activity in the community, equally significant.

The intertwining of parental and professional careers can be best captured with respect to social capital. Social capital in the family serves as the solid foundation of relationships. Optimally, internal and external capitals connect, and the networks thus formed cannot be separated from parents' professional networks and embeddedness in society. This view is also confirmed by Ravenara and Fernando's (2007) study conducted on a sample of 8000 respondents. They found that the presence of children in the family remarkably extended parents' social network and strengthened their trust in its members. Marital status also played a part as marriage resulted in the extension of the network; however, the presence of children in the family made marital status irrelevant. Single people had the smallest network relative to married or cohabiting families, but having children significantly increased their social capital as well. It was married women with children who proved to be the most active in various communities, such as school, religious, neighborhood, etc., which also indicates that children play a major role in building their parents' social networks.

THE RELATIONSHIP BETWEEN SCHOOLS AND FAMILIES

Family background plays an indisputable role in students' achievement and behavior at school. In primary and secondary education, which is the beginning of one's professional career, students' advancement is significantly affected by the forms of capital and resources their families possess. Social inequalities do not seem to even out in the school system (Bourdieu 1973; Coleman 1974; Boudon 1974; Kozma 1999; Róbert 2004; Róbert 2010; Szemerszki 2015). Recent research has attempted to prove that the effect of families on children's performance is not the mere function of socioeconomic status. Family structure, relationships between family members, the atmosphere and communication in the family, as well as quality time spent with children, all influence not only children's achievement and school careers but also their physical and mental development (Buda 1998; Croll 2004; Brown 2006; Acs 2007; Vandeleur et al. 2009; Kopp 2011; Kovács 2019).

parental
involvement

An important segment of parental involvement in schools is learning at home, which includes the actual time spent studying (e.g., assisting

children in their homework, checking it, asking what they have learnt, and checking their school supplies) as well as talking about not only what happened at school, but also children's adaptation to the community.

Students' conversations with parents are completed by the information teachers share with them about what happened in and outside classes – this is how parents can get a full picture. The flow of information can take place in an organized form (parent-teacher conferences, making an appointment with the teacher) or spontaneously. The latter is mainly typical of lower primary education, since during these years parents take their children to school and collect them after classes. Although spontaneous conversations are useful in this respect, they can easily become a nuisance to teachers if parents keep elbowing their way to them to ask something every morning. It is difficult for teachers to find the balance and the right tone in this way of communication. Oostdam and Hooge (2013) point out that teachers either provide adequate information and techniques of helping children's preparation at home, or simply keep parents at a safe distance. There is a vast amount of research evidencing that right parental involvement results in successful outcomes in children's school careers. The degree and success of parental involvement is contingent on several factors, including the circumstances of family background.

A diversity of parents and parental backgrounds are present even in schools of relatively homogeneous composition when it comes to **students' social backgrounds**. The involvement of parents, including learning at home, depends on age, gender, occupation, and past models, but most of all on parents' educational attainment, the place of residence, family size, and the family's economic background. Generally, it is well-qualified, high-status parents living in urban areas who create a learning environment at home that has a favorable effect on performance at school.

students' social
backgrounds

Mention must be made of research that highlights aspirations for social mobility: parents who stimulate their children to attain a higher level of education, and achieve higher positions than they themselves have, pay more attention to children's learning at home (Sheldon & Epstein 2005; Siraj-Blatchford 2010). These parents take a lot of care to assist their children and check their work, especially throughout the lower primary grades. After a while, however, as the school material becomes too difficult for them to cope with, they can be of lesser help and cannot afford private teachers either. Moreover, they do not have the means to develop infocommunication infrastructure at home.

It is among the tasks of educational institutions to **create equal opportunities** by compensating for the deficiencies of family background.

create equal
opportunities

What school communities can do in this respect is pay attention to students' personal development, adaptation and remedial education, as well as select and develop talented students. Such assistance improves student performance, promotes adaptation, and significantly reduces the risk of attrition stemming from a disadvantaged background.

At home, parents usually ask their children about school grades, homework, friends, and classmates. Specific home learning habits are also developed by families, but teachers can be of great help by providing regular information (verbal rather than numerical) about children's progress, abilities, and knowledge. In addition, teachers can also give practical advice on the circumstances, timing, regularity, habits, and techniques of learning at home. They are recommended to inform parents of opportunities for receiving external help for their children, including after-school support or remedial education and talent development programs.

QUESTIONS AND TASKS

1. What kind of family structure do today's students typically come from and how do these families function?
2. How is student achievement influenced by family background?
3. How can schools help children and young people prepare for their roles in adult life?
4. How can schools cooperate with students' families efficiently?

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Ethnic minority communities

This chapter presents the concept of minority existence, its types, historical background, interpretations, and main areas of study. It also addresses questions of both national and minority identity, as well as the possibilities and problems of minority education considering cultural ecological theory. After describing the models of minority education, we conclude by providing a picture of Hungarian-language higher education in the countries neighboring Hungary.

Basic concepts

Ethnic minority: An ethnic group which forms a minority within the area of a given state and whose members do not identify with the dominant ethnic group. National and ethnic minorities are also referred to as nationalities. A distinction can be made between ethnic minorities with a mother country (e.g. Alsatian or South Tyrolean Germans, or Transylvanian Hungarians) and those without one (e.g. the Welsh, Bretons, Basques and Lapps). Another typology differentiates between immigrant and autochthonous (indigenous) ethnic minorities.

Indigenous ethnic minority: Communities which became minorities in their lands of origin because of changes in state borders. Communities without a state of their own or a mother country are also regarded as indigenous ethnic and linguistic minorities by the Federal Union of European Nationalities. A hundred million Europeans belong to one of the over 400 minorities. Hungarians who live in the neighboring countries are also an indigenous ethnic minority.

Voluntary and involuntary minorities: The distinction is based on whether the minority population chose to live as a minority of their own accord or found themselves in minority position involuntarily, due to colonization or other historical events. Voluntary minorities are strongly motivated to assimilate, which helps them to adapt to majority schools.

Purely minority learning path: The language of education is the minority language throughout all levels of education.

Language maintenance program: It guarantees education entirely in the mother tongue for minority students, who have extra language classes to

learn the language of the state. This is the most tolerant education model for minority communities and is frequently applied in the regions outside Hungary with a Hungarian population, although education in Hungarian is not accessible everywhere from primary to higher education. The mother country plays an important role in implementing education in its language outside its borders.

NATION, NATIONALITY, ETHNIC GROUP, MINORITY

According to modern historical studies, the modern concept of nation evolved in relation to the fall of feudalism and the disintegration of societies grounded in the privileges of the estates. This process is referred to as “national awakening”, “renewal”, or “rebirth” by historians (Maxwell 2019).

The term **nation** in the modern sense denotes such “*long-lasting human communities evolved throughout history*” that are bound together or divided by certain characteristics (Romsics 2004: 9). It is impossible to give an accurate definition of these characteristics due to the complexity of each nation’s individual development. This statement is especially true if one considers that the criteria by which the concept of nation is frequently defined (e.g., a common history or origin, language, culture, land, etc.) are insufficient to give a comprehensive picture of the communities that think of themselves as nations. nation

Modern European historical studies distinguish between two types of nation. The main criterion of a **political or state nation** (the French model) is that its nationals belong to a state which encompasses a given territory. In contrast, a **cultural nation** (the German model) is based on a shared language, culture, and common myths of origin. The latter does not require an actual state, as the members of a cultural nation do not necessarily live in the same country (Romsics 2004). The two categories above serve as the basis of Anthony D. Smith’s theory, which makes a distinction between the western and eastern, or ethnic, models of nations. The former is characteristic of Western Europe and the United States, whereas the latter can be applied to the rest of the world, including Central and Eastern Europe (Smith 1991). In the Hungarian language, the word **nation** has traditionally been used in a cultural and ethnic sense. It does not denote citizenship of a state or being subject to a legal and political framework, instead referring to a linguistic and cultural community which may even reside in the territories of more than one political or state nation
cultural nation
nation

state (Romsics 2004). Both ‘nation’ and ‘nationality’ refer to what is meant by ‘*cultural nation*’. Therefore, these words do not signify the population of a given state but a linguistic-cultural community at a certain stage in its development, the members of which do not necessarily live in the territory of a single state.

nationalism

Like nation, **nationalism** is also a concept with several possible definitions. Smith (1991), for instance, puts it in a broader context which includes the evolution of nations, national identity, and ideology. Guibernau (1996) defines nationalism as a “*primarily emotional, that is, psychological, phenomenon which expresses attachment to one’s homeland, mother tongue, certain ideas, values and traditions as well as symbols of collective identity such as a flag, an anthem, or songs*” (cited by Romsics 2004: 11; cf. Guibernau 1996). There is, however, another interpretation of nationalism, which claims that state borders and national (ethnic) boundaries coincide. The most renowned supporters of this view are, among others, Ernest Gellner and Eric Hobsbawn (Gellner 1983; Hobsbawn 1990).

Ethnos

nation

Ethnos (meaning ‘ethnic group’), the Greek equivalent of the word **nation** (of Latin origin), is used in two senses. According to American sociologists and anthropologists, along with the schools they have established, ethnic groups are constituted by people who have a common cultural background and identity. If ethnic groups are defined in this way, the level of their political or cultural development is irrelevant. Instead, people are classified according to their nationality, the geographical location of their residence, their linguistic, racial, and religious backgrounds, and the characteristics of their lifestyles. From this perspective, Hungarians living in the neighboring countries form an ethnic group inside a dominant society, similarly to the Hungarian diaspora⁹ in the United States, or for that matter, to African Americans and Latinos living there.

Ethnic groups in Hungary began to build nations in the 19th century, when they also started to look upon themselves as nations, or national and religious minorities (Maxwell 2019; Romsics 2004).

The process during which ethnic groups become nations or nationalities is usually divided into two phases. In the first phase, the primary aim of ethnic groups is cultural integration. In the second phase, the culturally integrated ethnic groups set out to build integrated communities which

⁹ The term diaspora usually refers to ethnic or religious groups whose members were forced to leave their homelands but continued to cultivate their own cultures among the peoples of their adoptive countries.

recognize their own political interests and rights and make concerted efforts to assert them.

Nations or nationalities come into being if these intentions are successfully fulfilled (cf. Romsics 2004).

SENSE OF NATIONAL OR MINORITY IDENTITY

In Gereben's (2002) view, one of the key factors to a **sense of identity** is the aspiration for survival, which is most typical of minorities and endangered communities, as this helps them to preserve their sense of identity. The author projects identity into a virtual spatial arrangement with vertical and horizontal dimensions. The vertical dimension indicates individuals' positions in various communities within society, including their relationships with their families, local groups, religious communities, and ethnic groups. The horizontal dimension focuses on the adjoining scenes in which these social relationships are realized.

Regarding the vertical dimension, a prominent place is occupied by **national identity**, which for Hungarians is not restricted to the area within the state borders (Gereben 2002). However, it is not only national identity but also the minority existence which shapes the sense of identity of Hungarians who live in the neighboring countries. Gereben (2002) points out that identity has utmost significance for those who belong to a minority, since it safeguards them from assimilating into the majority and helps the preservation and transmission of their culture. Since living as a minority makes these Hungarians face various challenges every day, they have a much stronger sense of identity than those Hungarians who live in the motherland. Their national identity is instrumental in their survival as a nationality (Örkény 2006). Gereben (2002) has listed the following horizontal dimensions of the national identity of Hungarians living in the neighboring countries: a sense of belonging to a nation, a national self-image, a vision for the future, as well as religious, historical, and cultural identity.

One of the vital components to identity is language, which is incorporated into identity through education. Lack of **education in the mother tongue** can accelerate assimilation (Péntek 2008). Gereben's (2007) survey, involving a sample of nearly 4000 respondents across five countries (Slovakia, Ukraine, Romania, Serbia, and Hungary), revealed that the mother tongue has an outstanding role among the elements of identity and, therefore, constitutes an inevitable area of research on minority identity. Hungarians who live in the neighboring countries

are classified as minority speakers, whose situation is characterized by Péntek (2008) as one of “*forced bilingualism*”. The relationship between the majority languages of these countries and the minority (Hungarian) language is shaped by “*force and power*” (Péntek 2008). Gereben (2002) found that linguistic identity was a very pronounced aspect of Hungarian identity, which may be due to the fact that most respondents regarded their mother tongue as something given, while they thought of their identity as something they assumed by choice.

MINORITY EDUCATION IN LIGHT OF OGBU’S TYPOLOGY

John Ogbu (1978) makes a distinction between autonomous, immigrant/voluntary, and involuntary/castelike minorities. According to his definition, *autonomous minorities* are groups which have a racial, ethnic, linguistic and cultural identity, which is guaranteed in a country by common law or the constitution. Communities without a state of their own or a mother country are also regarded as indigenous ethnic and linguistic minorities by the Federal Union of European Nationalities.

Ogbu uses the terms *immigrant* or *voluntary minority* for those who choose to live in a country where they find themselves in a minority position. Usually, the motivation is providing a better future for children. Immigrants arriving in Europe or America fall into this category. The third group of minorities is called *involuntary* or *castelike minority*, involving groups that became minorities due to historical events such as changes in borders or colonization. They typically reject assimilation, refuse to adopt another language, preserve their identity, and struggle for political, economic, and social equality. The loss of the freedom they enjoyed previously has been a very painful experience to them. Castelike minorities include American Indians, African Americans, and Mexican Americans (Ogbu 1978; 1983).

Ogbu (1983) points out that in more industrialized and urbanized societies, where formal education has become institutionalized, the education of minorities always poses a challenge. One of the major issues is minority groups’ disproportionate school failure. Efforts made to enhance success often end in failure. Nevertheless, the author claims that education has the potential to eliminate social and economic inequalities between dominant and minority groups. He expresses the need to distinguish between different kinds of minorities in order to examine their success at school (Ogbu 1978). Minority status is not necessarily linked to permanent failure. Therefore, it is to be established which minorities are characterized

by disproportionate failure at school and what its causes are. According to this theory, minorities are to be classified according to the reasons for which they became minorities (e.g., their decision on a new place of residence was voluntary or out of necessity). It is also important to observe whether minorities suffer discrimination in their host countries.

Ogbu's differentiation allows for the separate observation of immigrants' and ethnic minorities' school performance, including their success or failure. He analyzed the school experiences of African Americans, a castelike minority, and of Chinese Americans, an immigrant minority. Although the two groups had experienced similar discriminatory treatment and came from similar socioeconomic backgrounds, they performed differently in the same schools. Ogbu used American Indians and Mexican Americans as examples to illustrate the position of involuntary minorities in education (Ogbu 1983). Some European minorities also belong to this category of Ogbu's cultural ecological theory. They are involuntary minorities in the sense that they became minorities when the state borders in Europe were shifted.

An alternative way to educate involuntary minorities is to establish a minority education system. For example, every member of the Swedish minority in Finland has the right to study in their mother tongue from kindergarten to higher education (the University of Turku), and Swedish is also one of the country's official languages. Similarly, at the schools of the German-speaking minority in South Tyrol, the official language of the state (Italian) is taught as a foreign language, whereas the minority language is taught at the schools attended by the majority. The accredited, trilingual Bolzano University was founded in 1997 to increase the number of citizens who hold a degree of higher education in this multi-ethnic province (McRae 2000; Baur & Medda-Windischer 2008).

Ogbu's model of involuntary minorities applies well to Hungarians living in neighboring countries, who became a minority against their will. In the Carpathian Basin, it was not until the Treaty of Trianon, signed after World War I, that some Hungarian communities had to experience minority existence (Gyáni 2021). Like American castelike minorities, Hungarian minorities also strive to preserve and cultivate their mother tongue and national identity. However, dominant societies are often intolerant of the use of minority languages and, instead, encourage the use of the official language of the state. Hence, Hungarians in the neighboring countries feel they are discriminated against in a permanent, institutionalized way. They find that the progress achieved by individuals, by virtue of their education and abilities, is insufficient, and so collective

preservation
of minority
education

action is needed to overcome the obstacles in their way. Feeling that the rules of the dominant society are against their interests, they join forces to achieve their goals, for example through education in the mother tongue. The most common tool for European indigenous minorities (including Hungarians) to fight assimilation is the **preservation of minority education**. Taking a stand against assimilation, the affected states provide minority education, generally at primary and secondary levels. Unlike castelike minorities in the United States, Hungarians in the neighboring countries can take part in education in the mother tongue if they choose to, which serves as a safety net against discrimination and prevents any resentment towards education. Ogbu's cultural ecological theory on minorities leads to the explanation of student performance and success. It presumes that incorporation/assimilation and discrimination against minorities influence performance at school (Ogbu 1978; 1983).

assimilation
paradox

However, failure at school, unsuccessful school careers, and performance below expectations do occur among voluntary minorities as well. The term **assimilation paradox** is used for the phenomenon that the children of parents who strive for assimilation make futile efforts to succeed in the majority language, within the majority education system, making them turn against the school and social norms (Rumbaut 1997; Pusztai & Márkus 2019).

MODELS OF MINORITY EDUCATION

The education
of minorities

The education of minorities is a very complex issue in multiethnic countries because educational policymakers may have different opinions across regions. As a result, education may have a beneficial impact on a minority in some cases, while, in others, it hinders their development. Minority education policies aspire to provide ethnic minorities with their own school and education systems (Kozma 2003). However, the state and ethnic minorities often have contradictory demands. The state continuously works on strengthening the majority nation, while minorities strive to preserve their national identity and their own education system. Minority education is equal to a struggle against assimilation (Papp Z. 2013).

Education in the
mother tongue

The choice of school plays a crucial role in minority communities' lives. It is not only a competition among educational institutions, but also a choice of the language of instruction. **Education in the mother tongue** means that members of an ethnic minority can take part in education in their mother tongue at their places of residence from kindergarten to

higher education (Papp Z. 2013). A student's way through the education system is called a student path (Stark 2015). Papp (2013) states that for members of minorities, there are two essential student paths which are determined by the majority-minority relationship:

1. Purely minority learning path: The language of education is the minority language throughout all levels of education.
2. Majority learning path: The language of education is the majority language with a high likelihood of assimilation.

Skutnabb-Kangas (1997) approaches the problems of education in the mother tongue, linguistic discrimination, assimilation, and integration from the perspective of education. She has formulated educational models which promote or hinder education in the mother tongue. The models are not based on the example of the minorities living in the Carpathian Basin but, nevertheless, are often applicable to their education. Skutnabb-Kangas (1997) has identified the following educational models:

- **Submersion program:** No education is provided for minorities in their mother tongue, and there are only majority educational institutions. Such a system leads to full assimilation and a language shift. Nádor (2003) points out that this model was applied in the education of minorities in Czechoslovakia between 1945–1948. Schools where the language of instruction had been Hungarian or German were closed, and therefore children who did not speak Slovakian at all were forced to complete their education in the majority language.
- **Transitional program:** Children receive education in their mother tongue for the first few years, and then they must switch to the dominant language. One of the tasks of lower primary education in the mother tongue is to prepare students for the change in the language of instruction. This model is primarily used for the education of immigrants in Europe as a means of integrating people from different linguistic and cultural backgrounds. The new Education Act of Ukraine, passed on 5 September 2017, also follows these principles (Закон «Про освіту» 2017). Paragraph 7 stipulates that education in the mother tongue should be provided between grades 1–4, after which education is only provided in the majority language. Contrary to other European practices, this model is not applied to immigrants to Ukraine (voluntary minorities) but to

indigenous minorities, who experience it as a drastic infringement on their rights.

- *Immersion program*: The dominant group opts for minority educational institutions voluntarily. As dominant societies are not overly tolerant of their minorities' national aspirations in this region, this model is not typical of Central and Eastern European countries. In recent years, however, an increasing number of ethnic Ukrainian parents have chosen Hungarian schools for their children in the Subcarpathian region. They probably hope that the acquisition of the Hungarian language will serve as a springboard for their children to continue their studies or find employment in Hungary or elsewhere in the European Union.
- *Language maintenance program*: Guarantees education entirely in the mother tongue for minority students. They have extra language classes to learn the language of the state. This is the most tolerant education model for minority communities, which is frequently applied in the regions outside Hungary with a Hungarian population, although education in Hungarian is not accessible everywhere from primary to higher education. The mother country plays an important role in implementing education in its language outside its borders.
- *Segregation technique*: Minority students are educated by under-qualified teachers in institutions with poor infrastructure, which absolutely excludes the possibility of integration. This model does not exist in Central and Eastern Europe. However, the Roma minority in Hungary has protested the foundation of purely Roma schools and classes in fear of segregation.

It is also an option for members of minority groups to enter institutions where education takes place in the dominant language with a view to finding employment more easily in the future. On the other hand, this promotes assimilation and language shift (Papp Z. 2013).

THE PRIMARY AND SECONDARY EDUCATION OF HUNGARIANS IN THE NEIGHBORING COUNTRIES

primary and
secondary
education

It is indispensable for minorities to complete their **primary and secondary education** in their mother tongue in order to be able to use and preserve the language, become familiar with their history, and maintain their culture. From their perspective, education in the mother tongue can be

regarded as a kind of substructure within the nation state (Papp Z. 2013). Educational institutions in the regions with a Hungarian minority can be classified according to the language of instruction. In some schools, the language of instruction is Hungarian, and the official language of the state is taught as a foreign language. In other schools, the language of instruction is the dominant language, and the minority language can be taught as a foreign language. Furthermore, there are bilingual schools with separate classes for minority children who are educated in their mother tongue and for majority children who are educated in the dominant language (cf.: Fóris-Ferenczi & Péntek 2011). The choice of school plays a crucial role in Hungarian minorities' lives. The choice is not only among schools but also between the mother tongue and the official language (Papp Z. 2013).

HIGHER EDUCATION OF HUNGARIANS IN THE NEIGHBORING COUNTRIES

Minority higher education institutions are of utmost importance to ethnic minority groups as they are responsible for educating the intelligentsia and academic elite of these communities (Kozma & Radacsi 2000).

Minority higher
education
institutions

The democratic transition had an enormous impact on education everywhere across Europe. In the 1990s, the focus of education policy shifted to higher education (Kozma 1993). As the borders opened, the excessive underdevelopment of the border regions and the deterioration of bilateral relationships were brought to light. The 1990s saw reforms in higher education, including new connections across the borders. In those years, the minorities of Central Europe were primarily occupied with establishing their institutional systems (Bárdi & Misovicz 2010). Higher education went through unprecedented expansion, which affected Hungarian higher education both within and outside Hungary's borders. This was when Hungarian minority universities were founded. Each foundation process was assisted by a university operating in Hungary. According to policies from this time, Hungary was to support the foundation of institutions, which would subsequently be operated by the minority community. The period between 1990–1994 was a historical moment with a power vacuum in higher education (Kozma & Tózsér 2016). Under these circumstances, several civic initiatives for the foundation of universities were launched by higher education institutions in Hungary as well as Hungarian churches, local governments and foundations in the neighboring countries. However, minority education

is the most vulnerable at the tertiary level because, when the theory of minority education was developed, only a narrow circle of students had access to higher education.

Figure 3 shows the higher education institutions in the Carpathian Basin where the language of instruction is either entirely or partly Hungarian.

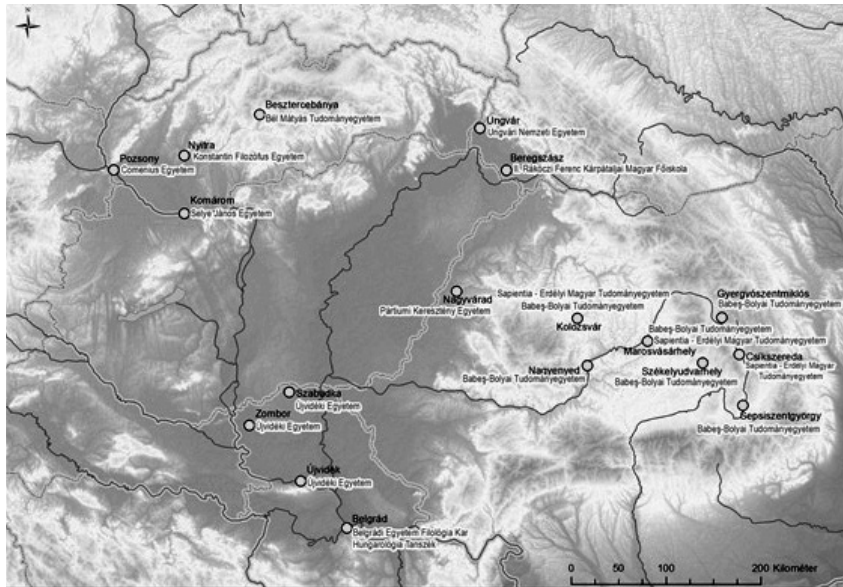


FIGURE 3. Hungarian higher education institutions in the neighboring countries

These institutions are universities and colleges accredited by the respective states. Students graduate after having completed a degree program in Hungarian, and their qualifications are officially acknowledged as higher education degrees. The institutions can be classified according to the language of instruction:

- Institutions where the language of instruction is only Hungarian, including off-site programs of higher education institutions operating in Hungary: Ferenc Rákóczi II. Transcarpathian Hungarian College of Higher Education, Partium Christian University, János Selye University, and Sapientia Hungarian University of Transylvania.
- Institutions with parallel faculties which provide education in Hungarian or in the dominant language: Uzhhorod National University, Babeş-Bolyai University

- Institutions which provide education in the dominant language but have departments of Hungarian language and literature or Hungarian studies: University of Belgrade, Faculty of Philology, Department of Hungarian Language, Literature and Culture; Matej Bel University, Department of Finno-Ugric Languages; Comenius University, Faculty of Arts, Department of Hungarian Language and Literature; Constantine the Philosopher University, Faculty of Central European Studies, Department of Hungarian Language and Literature.

SUMMARY

Education grounded in multicultural (polyethnic) ethnic policies promotes both the success of minority students and the growth of regional and minority cultures. Linguistic and cultural diversity has a strong educational potential in multilingual countries which have been able to bring to fruition the resources inherent in their minorities. Switzerland, the Benelux states, and Scandinavian countries offer their citizens a wide range of opportunities in education, culture, and language use, which has largely contributed to their economic growth and domestic stability.

QUESTIONS AND TASKS

1. By which criteria can ethnic minorities be classified?
2. Why has the idea of cultural nations become dominant in Central and Eastern Europe?
3. Where would you place Hungarians living in the neighboring countries in John Ogbu's typology?
4. Compare the models developed for the education of minority communities.
5. How would you explain contradictory visions of states and ethnic minorities with respect to minority education?

RECOMMENDED READING

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Roma/Gypsy communities

One of the fundamental questions of public and higher education is minority students' participation and success in education, with special regard to the historically rooted disadvantage of the Roma/Gypsy population in their educational attainment. This chapter first discusses segregation and then focuses on the tendencies and programs which can have an impact on it. We also present research findings on family socialization, segregation in the school system, the causes of poor performance at school, and the potential causes of good performance, as well as actors and supportive programs that promote student success.

Basic concepts

Characteristics of *traditional Roma family socialization*: frustration related to *basic needs* is to be avoided, the scene of family life is open to the outside world, children have great freedom of movement. The main commonly shared norms are dedication, self-sacrifice, favors, sharing goods with others, and reciprocity.

Models of minority education: There are three generally known models: 1) *The cultural deficit model* presumes that the culture of people belonging to subcultures is deficient, and it is the school's task to remedy the deficiency. 2) *The cultural differences model* accepts the individuality of minority cultures but ignores the relationship between majority and minority cultures in a society. 3) *The bicultural model* means simultaneous intercultural socialization, enabling children to become acquainted with both cultures.

Forms of school segregation: Segregation within and among schools, and segregation arising from geographical factors. Segregation within schools means that classes are formed on a selective basis, which directly leads to segregation. An increase in the number of Roma students gives rise to the influx of non-Roma students to other schools, resulting in segregation among schools. The same type of segregation is also triggered by the fact that being more mobile, the well-qualified, mostly non-Roma population moves away in search of better opportunities. Consequently, in regions where unemployment is high, the proportion of Roma populations rises.

Conflict-ridden family-school relationship: Roma families and schools differ in their interpretations of educational goals. Roma people often regard conflicts as ethnic problems. What schools consider a simple student-teacher conflict is often interpreted as a non-Roma – Roma one by Gypsy families. Owing to their own frustrating experiences about education in the past, parents see no point in investing in their children's schooling. The family-school relationship is ridden with mutual distrust and dissatisfaction.

Integration programs: The term *integration* is used by educational policy for all forms of intervention aiming to reduce the academic failures of students who are considered disadvantaged in any respect. The internationally pursued objectives of integration programs so far into the 21st century include fairness, equality of opportunities, integration, inclusion, reintroducing students to education, and policies combating academic failures.

CHARACTERISTICS OF FAMILY SOCIALIZATION¹⁰

Family
socialization

Roma students' educational paths are strongly influenced by patterns of early socialization. **Family socialization** is inextricably linked to Roma¹¹ culture, norms, and values. However, this does not mean that the role of family socialization in success or failure at school can be analyzed from a cultural anthropological perspective (or even a sociological one, which attributes lack of success to structural causes). These approaches borrow statements about family socialization from cultural anthropology to support structural explanations, for example about child-rearing, gender roles, or growing up too fast.

According to Formoso and Burrell (2000), one of the essential features of Roma children's socialization is attending to their **needs**. For example,

¹⁰ This chapter is partly based on the author's habilitation thesis titled "The Social and Health Status of the Roma in North-Eastern Hungary" (University of Debrecen, 2008).

¹¹ The term 'Roma' is the endonym used by some ethnic Roma/Gypsy groups; it is the plural of the Romani word meaning 'man'. In Hungary, it is the endonym of Vlach Gypsies. The word 'Cigány' ('cigány' is in Hungarian language; it is used in other language too, eg. cigani, țiganilor, zigeuner) is the exonym of this ethnic group, deriving from the Greek word *ασιγγανος* 'atsinganos', meaning 'untouchable', and is used in most European languages. The third widespread name, the 'Gypsy' derives from the word 'Egyptian', which is how Gypsies called themselves when they migrated into Europe (e.g. ejifto, giftoi [Greek]). The word *Gadjo* (meaning 'peasant, farmer') is used by the Roma to refer to people who are outside the Roma society and belong to the majority (Szuhay 2005). Due to the inconsistencies in the classification of this ethnic group, the European Council uses the terms 'Roma', 'Gypsies', 'Travellers' simultaneously. Being aware of, and taking into consideration, the differences in meaning between the words 'Roma' and 'Gypsy', we often alternate between the two.

they are fed when they cry, because crying is considered a sign of illness. There is no time or place assigned to eating; neither are potty-training or sleep regulated. In other words, frustration related to *basic needs* is avoided. As well as the satisfaction of needs, the *use of space* is also idiosyncratic: Roma people's living spaces are open towards the outside world, but the scene of family life is much wider than that. Contrary to Gadjo (non-Roma) customs, the doors of homes are not borderlines within a community, and there is no need to ask for admission. Men and women usually look for the company of the members of their own sex, and the common living space is outside, which is why children have a great freedom of movement. Adults have the full right to intervene in the activities of the children who belong to their group if they disapprove of the activities or find them dangerous. Girls are expected to live in abstinence before marriage, for which reason they are carefully protected from being seduced, especially by Gadjos. The parent-child relationship is characterized by the attitude that "the child comes first". What is more, children are "never left alone, contrary to what Gadjos do". Skills they must acquire during socialization include dedication, self-sacrifice, doing favors, sharing their goods with others, and the rules of reciprocity. The educational techniques include persuasion, admonishing, and the enforcement of collective norms, but not threats. The socialization of Roma children is very unique, in that individuals have great autonomy, i.e., there is no coercion and no "boss". Autonomy, however, does not mean individualism. In a study of Roma family socialization, Forray and Hegedűs (2003) point out that Roma children are raised by the **community**. Young children enjoy complete freedom, and "taking care" of them does not mean prohibition or limiting their movement, but protection. Parents neither coerce nor train their children, who can have their needs satisfied immediately. Children and adults live and work together, which helps the acquisition of roles. Since they are treated as equal members of the community during the learning process, the stage of crisis during adolescence is bypassed. Concerning gender roles, the authors emphasize that young women, following the "work – accumulation" model, do much more work for less "profit" than men, so it is only with considerable support from the family and the community that they can leave the family to get married. Girls are socialized for hard work, adaptability, and maintaining relationships, which all promote their individual mobility; there is usually a strong mother figure behind their occasional career stories. In contrast to the female roles marked by "work – accumulation – household", men's roles are centered around

"the child comes first"

community

“trading – spending – brothers” (Forray & Hegedűs, 2003; Kozma et al. 2003; Afanasieva et al. 2020).

how Roma
and non-Roma
cultures relate to
each other

When examining Roma people’s socialization, one must not ignore **how Roma and non-Roma cultures relate to each other** (Forray & Hegedűs 1998). There are three models of the socialization of minority people. *The cultural deficit model* presumes that the culture of people belonging to subcultures is deficient, and it is the task of education to remedy the deficiency. *The cultural differences model* accepts the individuality and special features of minority cultures but ignores the relationship between majority and minority cultures in a society. *The bicultural model* means (nearly) simultaneous intercultural socialization, enabling children to become acquainted with both cultures. Being born into their own culture, members of a minority group “acquire it unconsciously”, while they learn about majority culture through the education system and the mass media. Dual socialization is more efficient if there is some overlap between the two cultures, if certain members of the minority are able to convey different cultural content as sources or mediators, if dual bonding is also possible in informal communication, and if minority people get more than just negative feedback.

conflicts between
schools and Roma
families

Based on their empirical research, Forray and Hegedűs (1998) have analyzed the **conflicts between schools and Roma families**. The three main areas of conflict are educational goals, education as provided by schools, and the relationship between “Hungarian” schools and Roma families (Forray & Hegedűs 1998; Forray 2013; Forray 2020). Schools see themselves as institutions based on a social consensus on educational goals, values, and norms. On the other hand, in Roma people’s interpretation, the operation of schools is grounded in laws and regulations, and therefore schools coerce, punish, and retaliate. While schools claim to prepare children for life, the Roma are convinced that real life takes place outside schools. Schools claim that the education they offer gives better prospects for life and, therefore, it is also their task to set the values to be followed, while Roma families demand the right to select the knowledge to be acquired. Schools give grades to evaluate student achievement, while the Roma think teachers evaluate students through praising and scolding. Schools and Roma families also differ in their views on the role of school in child-rearing: institutions claim priority during school-time, while the Roma always assert the family’s and community’s priority. According to schools, it is the families’ duty to send their children to school prepared, while the Roma think it is the task of schools to prepare children to meet school requirements. Schools claim to take over some child-rearing duties

from families, which is rejected by Roma families, who regard child-rearing as their exclusive domain. Schools consider all their students as children, while the Roma hold the view that children are children only until adolescence. Schools put personal emotions aside in their teaching, which is contrary to the Roma view. Schools treat conflicts as disputes between teachers and students or between students, while in the Roma's view, there is Roma-Gadjo opposition at the heart of each **conflict at school**. Parents are expected to keep out of the institutions at school-time, but the Roma see it as the parents' and communities' duty to protect their children no matter where they are. The self-image of schools suggests that children should be removed from families for education, while the Roma firmly believe that the place of the child is in the family and the community. The analysis made by Forray and Hegedűs (Forray & Hegedűs 1998) about the conflict between schools and Roma families is based on cultural differences and opposing views on the roles of socialization agents, as well as on the ways of socialization. They applied cultural anthropological and sociological methods in their research; however, they interpreted their results mainly from a cultural perspective. One view in the debate on the causes of failure at school attributes poor performance to family socialization; which is also shared by the authors, although they speak of "different", and not inferior, socialization. The fact that Roma socialization is different from that of the majority, and of majority schools, is rooted in Roma ethnic culture.

conflict at school

SEGREGATION IN THE SCHOOL SYSTEM

Roma people's low educational attainment is an international phenomenon. In Hungary, their educational attainment is somewhat higher than in other countries with sizeable Roma minorities (Cserti Csapó 2019; Roma and Travellers 2006). The proportion of educated Roma people grew quite significantly in the 2010s, with fewer Roma people not completing primary education and more taking the secondary school leaving exam.

Low educational attainment is considered by most researchers to be the primary cause of the Roma's social disadvantage and poverty, as it leads to high unemployment rates and low income. Consequently, researchers and policymakers agree that the key to Roma social integration is improving their educational attainment and vocational qualifications. When analyzing the causes of low educational attainment, research usually highlights three major problems: segregation at school, Roma students' failures at school, and the effect of family socialization on

Low educational attainment

academic achievement. The characteristics of Roma family socialization will be addressed in the last section.

Segregation at school

Segregation at school can take several forms, such as segregation within and among schools, as well as among settlements. Segregation among schools can be explained by an increase in the number of Roma students at one location, which gives rise to the influx of non-Roma students to other schools. The same type of segregation is also triggered by the fact that, by being more mobile, the well-qualified, mostly non-Roma population moves away in search of better opportunities. Consequently, in regions where unemployment rates are high, the proportion of the Roma rises. Migration is also present among the Roma population, who move to urban ghettos and to impoverished small villages. As a result, the proportion of the Roma grows in these areas, which leads to the non-Roma population moving away (Pásztor et al. 2012; Araújo 2016). Segregation within schools impairs the quality of education, which results in early school leaving.

segregation within the place of residence

Place of residence may result in two different types of segregation. First, Roma people often face **segregation within the place of residence**, as a result of which the catchment areas of certain schools consist of mostly Roma students. This type of segregation is significantly influenced by the number of inhabitants: the smaller the settlement, the higher the proportion of the Roma population (Pérez et al. 2018; Havas 2002). One third of primary school aged Roma children attend school in small villages with populations of under 1000. In these schools, the proportion of Roma students is over 50%, while only 6% of the entire population live in such settlements. The second type of segregation is selection among schools, which brings about the exit of non-Roma children from schools where Roma students are in majority. This can happen due to actual migration (i.e., non-Roma families moving away from their places of residence), but non-Roma children may also switch to other schools within their settlement or in other settlements without the family leaving their original place of residence. This is often because the birth rate of the Roma is higher than that of the entire population at a given location. When the proportion of Roma children at a school reaches a certain level, non-Roma parents take their children away from the school. As such, selection among schools is the outcome of parents' decisions to enroll their children in other schools. This phenomenon is referred to as "white flight", an internationally known phenomenon which inspires debates over the policies that give rise to it (Coleman 1975; Rossell 1975). Hungarian research is inconsistent about the **"threshold level"** above which non-

"threshold level"

Roma parents opt for changing schools (Papp Z. & Neumann, 2021; Fónai et al. 2018). Researchers point out that Durkheim’s “social facts” are to be taken into consideration for the interpretation of the phenomenon, and in this context, parents’ decisions can be regarded as rational. However, it is not the increasing proportion of Roma students in itself, but its perception (by teachers) that undermines teachers’ perception of student performance (Erdei & Kovács 2020).

“Special” schools and classes, which were not unique to Hungary, were sore points in Roma school segregation for decades. Liegeois (1995) gives an analysis of “special classes”, which were originally founded as a first step towards integration, but were also aimed at preserving the culture of outcast groups. However, these two objectives cancelled each other out and led to ghetto-like special schools. Roma children were allocated to the schools for mentally handicapped or socially disadvantaged children for financial, pedagogical, or ideological reasons. This was even ordered by directives in several countries. A typical reason for the segregation of Roma children was “adaptation difficulty”, which was measured and proved by tests in many European countries. Despite having been “particularly” developed for the Roma population as “objective and accurate” tools, these tests, as Liegeois observed, were never adjusted to the Roma’s needs. The test results inspired statements such as Roma children having defective cognitive and weak social skills, being disorganized and uncoordinated, and having mental disorders (Liegeois 1995). Therefore, several countries provided the opportunity to introduce “special education” for those who were deemed to be struggling. Liegeois adds that Roma parents gladly accepted the situation, having the impression that their children were “given attention and a helping hand”. Liegeois remarks that it was ethnocentric value judgements, paternalistic ideologies, and assimilation policies that labelled families and communities with different cultures as “unfavorable environments” to children, where the only thing they could experience was deprivation (Liegeois 1995).

“Special” schools and classes

THE CAUSES OF FAILURE AT SCHOOL

One of the most documented, studied, and debated issues in the literature is that of Roma students’ lack of success at school. Researchers have established **nine main areas and causes of failure** (Fiáth 2011; Liegeois 1995; Roma and Travellers 2006):

nine main areas and causes of failure

- Characteristics of Roma family socialization such as their daily routine, time management, priority given to children and their needs, and the style of child-rearing based on imitation rather than disciplining and punishment. Most Roma families prepare their children for other things than schools do. For example, boys are brought up to be pushy and clever, and girls are raised to fulfill their roles in the family.
- The predominantly conflict-ridden relationship between families and schools. The two parties have different expectations for educational goals. Roma families think it is their task to prepare their children for life. The fact that schools take over part of this task is not accepted by Roma families, generating conflict between the two sides. Additionally, the Roma think that academic work is entirely within the scope of schools, and parents do not have to be involved. Roma people often regard conflicts as ethnic problems. What schools consider a simple student-teacher conflict is often interpreted as a Gadjó-Roma one by Roma families. Owing to their frustrating experiences about their own education in the past, parents see no point in investing in their children's schooling, which is one of the reasons why tensions arising from absenteeism are treated differently by schools and parents.
- Low social status, which is often the result of high unemployment (among other things). It affects living and housing conditions, manifesting itself in cramped dwellings, malnutrition, unhealthy lifestyles, and a lack of school supplies. All this adds to the feeling of relative deprivation.
- Linguistic disadvantage, which can be linked partly with bilingualism and partly with families' cultural milieus and cultural capital. Roma children whose mother tongue is not Hungarian are less likely to complete primary education.
- Attending kindergarten (for children aged 3-6 in Hungary) is instrumental in the acquisition of knowledge, skills, and patterns of socialization, in practicing the Hungarian language, and becoming accustomed to do certain activities. However, one tenth of Roma children do not attend kindergarten even after the age of five and, moreover, parents often defy the institution's cultural norms. Additionally, it is not uncommon for kindergartens to discriminate against Roma children. Roma children's low school readiness rates can be traced back to their poor kindergarten attendance.
- The quality of a school is largely influenced by the proportion of Roma students, which is associated with weaker student

performance. This suggests that disadvantage is not rooted in the settlement type or the level of the school's technical equipment, but in family socialization prior to school and in school readiness.

- Poor motivation, which has two explanations in the literature. One theory holds that it originates in the family as knowledge gained at school ranks very low in the Roma's survival strategies, which leaves children unmotivated. According to the other explanation, Roma children lose their motivation at school as a result of continuous failure and experiencing exclusion. So far, very few empirical studies have been conducted in this area, which, however, show that the children of the middle-class Roma elite are also motivated at secondary school.
- Prejudices and negative discrimination. For example, asserting their Roma identity can cause conflicts and anxiety in students because of the prejudices they face. Prejudiced thinking leads to negative discrimination and segregation. Homogeneous Roma classes, especially if they must meet lower requirements, perform very poorly.
- Pedagogical practices. Not only are many teachers unfamiliar with the range of methods to choose from, but they also have insufficient information about Roma people and culture. Radó (2020) attributes Roma students' failures to undifferentiated pedagogical practices and elitist expectations. As homogeneous classes are "easy to teach", there is a general tendency to form such groups at schools. It is especially true for Roma students, who become separated in the early years of school without any efficient compensating mechanisms. Stereotypical and prejudiced expectations pave the way for full segregation.

In teachers' opinion, Roma children's poor performance at school is the consequence of their disadvantaged family background and socialization, as opposed to being a result of their abilities (Liskó 2001, Óhidy 2020). Teachers specified the following causes: poverty, lack of school supplies, inadequate conditions for studying at home, the division of labor in the family, a lifestyle which does not allow time for studying, undermotivated parents, and family and adaptation problems. Regarding teacher behavior, the following types can be identified: (1) exclusion, blatant discrimination and prejudices, (2) authoritarianism without exclusion, (3) forceful, authoritarian pressure for assimilation, (4) indifference and lack of interest, (5) liberal treatment with traditional pedagogical techniques, (6) liberal treatment and methodological innovations.

relationship with
parents

Schools' **relationship with parents** is ridden with mutual distrust, partly because schools represent middle-class values, which are perceived by Roma parents as something alien imposed on them by an authority. Schools, on the other hand, claim that Roma parents are not active enough and contact the school only to give voice to their dissatisfaction with somebody or something in an unrestrained, blunt manner. Heads of Roma families attributed **early school leaving** mainly to be due to financial reasons (i.e., they could not afford proper clothes and supplies, they had to work), regarding it to be a consequence of poverty. Children's lack of motivation also played a part, but discriminative remarks or changes in family circumstances, such as expecting a baby or having to look after siblings, were not mentioned frequently among the reasons for dropping out of school (Fónai & Vitál 2012).

early school
leaving

POTENTIAL CAUSES OF SUCCESS AT SCHOOL AND ACTORS PROMOTING SUCCESS

kindergarten
network

knowledge
of Romology

positive feedback

Success at school,
which includes
academic, cultural,
and sports
achievements

Most studies that investigate Roma students' school careers not only focus on failures but also analyze Roma students' potential success and its components. Factors that contribute to success include the improvement of the **kindergarten network**, flexible and prolonged school-start times in primary education, launching modular vocational training programs, new models of adult secondary education, teachers' **knowledge of Romology**, as well as innovative, empowering, and motivating teaching techniques, **positive feedback**, parental involvement, and better-equipped school buildings (Forray & Hegedűs 1999; Kozma et al. 2003; Raduly 2001; Babusik 2004; Dubayova et al. 2021). **Success at school, which includes academic, cultural, and sports achievements**, has an impact on academic performance regardless of the proportion of Roma students in a class (Fónai & Hüse 2018). Another significant factor is inclusive education, which has the potential for reducing Roma students' social and educational disadvantages. It is, however, questionable how widely accepted and practiced this form of education is across various countries (McDonald & Tanaka 2007; Varga 2008; Fónai et al. 2021; Mendes et al. 2021). Studies on inclusive education have produced convincing results about the inclusion and performance of Roma students.

social capital

It is fundamental to the future how institutions with their available resources and "natural" actors can support young Roma people. What explains the operation of compensation mechanisms best is the concept of **social capital** (Coleman 1988). Various programs have been launched

over the years to integrate disadvantaged students, including Roma and other minorities, in primary, secondary, and higher education. Since the democratic transition in Hungary, these programs have been initiated by NGOs, Roma communities, and partly by the state (Cserti Csapó 2019; Godó et al. 2020). The “normative subsidy for integration” that was introduced in the 1990s was aimed to support special student groups. The internationally pursued objectives of integration programs in the 2000s included fairness, equality of opportunities, integration, inclusion, reintroducing students to education, and policies combating academic disadvantages. These programs proved to be successful in many areas and reduced some of the inequalities in education. However, it is important that they should be aligned with other policies to form a coherent system.

Roma special colleges, which are a unique form of support, offer residence to higher education students and provide them with a solid financial and infrastructural background. Apart from giving minority students assistance in their studies, special colleges also help them assert their Roma identity. Students receive a grant, accommodation, and support from tutors and mentors. The aims of these institutions, such as creating opportunities, community building, strengthening Roma identity, and talent development, are realized mainly through informal pedagogical practices (Jancsák 2016). The activity of Roma special colleges has been documented and analyzed in several studies.

Roma special colleges

In the 2000s, special colleges (also referred to as colleges of advanced studies) were subjects of intense debate. The question was raised as to whether they really supported talented but disadvantaged students, or rather if they served the purposes of elite training. This dilemma is especially relevant to Roma special colleges. Ceglédi and Bocsi (2021) maintains that they give impetus to students, guide them, and provide them with tools to make the best of their higher education and compensate for unfavorable backgrounds. They add that their most remarkable task is to enable students with similar backgrounds to create social capital drawing on one another’s life stories and their mutual respect for one another (Ceglédi & Bocsi 20218). Their research findings confirm that Roma special colleges have achieved the goals they were intended to reach.

Apart from integration facilitated by institutions, another instrumental factor in raising Roma students from their disadvantaged position is *religion and the churches*, which might help them to accept themselves, transform their way of thinking, and may also influence their identity. It has been documented that primary school preparation and integration programs, as well as summer camps organized under the auspices

of missionary projects, have favorable effects (Puztai & Inántsý-Pap,2019, Fónai & Cséke 2017).

SUMMARY

The educational attainment of the Roma population, which is a significant minority in several Central and Eastern European countries, is well below the average of the majority population. This is one of the primary causes of their disadvantaged social status and poverty. Although Roma people's educational attainment in Hungary is favorable in international comparison, educational policy still needs to tackle Roma students' underachievement and attrition. Disadvantages and failure at school are part of a more general social trend affecting the Roma, namely segregation. School systems are unable to curb segregation and selection, which is likely to their low educational attainment.

However, there is another factor which – provided that all its components combine in the right way – might reduce the Roma's disadvantage in education: the operation of social capital both in its institutional and non-institutional forms. In other words, individuals do have the chance to break out, and the key institutions are schools. In the second half of the chapter, we have presented institutional solutions and various forms of social capital that might counterbalance structural trends.

QUESTIONS AND TASKS

1. What are the main characteristics of socialization within a Roma family?
2. Summarize the causes of Roma students' failure at school.
3. What are the causes of non-Roma students' departure?
4. Describe the common relationship between Roma parents and schools.
5. What are the objectives of integration programs?

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Religious communities

Religious socialization, which plays a key role in education, is an aspect of permanent formal and informal social learning, which is why it is one of the noteworthy research areas of the sociology of education. Understanding religious socialization which takes place in families and educational institutions is also gaining importance in today's multiethnic societies. What hinders the clarity of insight is that the perception of the form, content, duration, agents, and success of religious education, and even of religiosity itself, is highly dependent on culture and the social environment. Additionally, researchers' notions of society and their individual views can result in further variations in the interpretation of data. This chapter first discusses the interpretations and agents of religious socialization, then presents research findings on the relationship between religiosity and educational attainment and, finally, certain characteristics of the student composition and school culture of denominational schools are pointed out.

Key concepts

Religiosity: All the views, activities, and institutions based on a transcendental interpretation of the world. Its social purpose is to offer a complex understanding of the world, build communities, and create a consensus of values and norms that span over boundaries between social strata. Altogether, it contributes to the stability of society.

Religious socialization: Permanent formal and informal social learning. Regardless of its outcomes, it is a process whereby not only are individuals' attitudes to transcendence, their identities, lifestyles, social responsibility, and social networks shaped in accordance with their religious views, but also their relationship with the natural environment.

Religious capital: The experience gained from practicing one's religion invests one with religious capital (Iannacone 1988), which influences one's decisions and activities and may benefit the economy and their education as well. The three forms of religious capital are religious human capital, which

comprises knowledge; religious cultural capital, which is based on familiarity with rituals; and religious social capital, derived from relationships with members of the religious community. The first two forms can be separated from the third one to collectively be termed as spiritual capital (Finke 2003).

Religious in one's own way: Religious individuals who are only loosely connected to churches or other official organizations. Regarding individual and collective religious practice, it is a very heterogeneous group, which can be divided into several subgroups such as believers with weakened ties to their churches, people who create their own individual religion (*DIY* or *à la carte religion*), believers who are very critical of and distanced from churches and religious organizations, as well as self-critical believers. Approximately half of the Hungarian population belongs to the above category.

Church-run schools: Educational institutions run by churches or their organizations. Statistics treat the church sector as one unit, but institutions in this category are operated by a wide range of school providers which coordinate their educational work to a certain extent within denominational frameworks. Therefore it is more accurate to use the term denominational schools.

RELIGIOUS SOCIALIZATION¹²

religious
socialization

Youth studies have revealed that the proportion of young people who are exposed to a religious upbringing or education is gradually declining. In Hungary, as of 2008 one-third of young people claimed to have been brought up in religious faith, in 2012 one-fourth of them did so, whereas in 2016 their proportion was below one-fourth. Nevertheless, **religious socialization** is not always the outcome of education at home. Nine tenths of young people who received religious upbringing as children report being religious in their youth as well. However, one-third of those who have not received any religious upbringing have become religious despite their family background. This chapter focuses on the nature of religious education, its agents, and its effect on individuals' performance at school and in society.

religious
upbringing

To understand **religious upbringing**, the notion of religiosity must first be clarified. Religiosity encompasses all views, activities, and institutions based on a transcendental interpretation of the world. Researchers are unanimous about the social functions of religiosity, namely that it offers

¹² This study is the revised version of a chapter of the book titled *The Sociology of Education Applied to Religion* by Gabriella Pusztai.

a complex understanding of the world, builds communities, and creates a consensus of values and norms that spans over boundaries between social strata. Altogether, it contributes to the stability of society (Durkheim 2016; Iannaccone 1998; Luhmann 2000). Due to its complexity, religiosity is difficult to measure and standardize. Indicators used in quantitative research can mostly measure performative, external, or organized religiosity along with its ritual dimensions. As religiosity does not manifest itself in uniform views and forms of worship, standardization goes with the hazard of excessive reductionism. Multidimensional and qualitative research has revealed that religiosity cannot be restricted to the activity of registered members of religious organizations (Glock & Stark 1965).

Religious socialization is an important element of permanent formal and informal social learning. Regardless of its outcomes, it is a process whereby not only are individuals' attitudes to transcendence, their identities, lifestyles, social responsibility, and social networks shaped in accordance with their religious views, but also their relationship with the natural environment. (Fowler & Dell 2006). Theoretical approaches differ in what they consider to be at the core of this process.

According to classical theories, religious socialization is the transmission of the views, norms and customs held by previous generations for younger generations to be internalized (Sherkat 2003). Parents are regarded as active, influential agents, while children are seen to be passive receivers. In this model, the **reproduction of religiosity** is a linear process that can be concluded, advancing through the stages of childhood, adolescence, and youth to a relatively standard and mature adult faith (Benson et al. 1993). This view of religious socialization is based on the reconstructionist approach to religiosity. As functionalist theories point out, religious socialization plays a major role in social integration. Critical approaches, however, contend that the transmission of religiosity is achieved by the agents of socialization (parents and religious organizations) by means of power and coercion (Martin et al. 2003). From the **social constructivist perspective**, individuals do not receive religion ready-made, but instead construct their own faith independently and through interacting with their environment, taking an active part in developing the content of their faith and religious practices as explorers and experimenters. The diversity of religious preferences in society compels individuals to be constantly critical of themselves and to keep rethinking their views (Martí 2015; Hunt 2015; Kézdy et al. 2011). This creates several individual versions of religiosity, (known as

reproduction
of religiosity

social
constructivist
perspective

the privatization of religion), which leads to increasing the significance of individuals who work on their religious faith, and diminishing the role of institutional religious authorities (Tomka 2011).

AGENTS OF RELIGIOUS SOCIALIZATION

family subculture Every **family subculture** has a stance on the questions of religion. Most researchers attribute utmost importance to the direct influence of parents. The effective transmission of parents' religious preferences (whether they are religious or not) is affected by factors such as parents' educational attainment and economic status, family structure, the style of child-rearing, and the time and attention parents dedicate to their children (Martin et al. 2003; Vermeer 2014). An intact family structure, parents' agreement on their value systems and religious preferences, being members of the same denomination, as well as a similar intensity of religious practice, all have their independent impact (Pusztai 2015a). Research on the religious socialization of families with a non-Christian religious background has not only confirmed the significance of families, but also the dominant role played by the cohesive social network formed by relatives and neighbors in such cultures (Maliapaard et al. 2012; Güngör et al. 2013; Lagrange 2014).

peer social networks In addition to families, the literature also specifies other highly important agents of religious socialization, namely organized religious communities and **peer social networks** (Martin et al. 2003). The latter is especially crucial to the development of religious preference during the teenage years. Peer or school influence can also transmit parental religiosity (Desrosiers et al. 2011). The theory of the direct imitation of models in religious socialization is refined by the channeling hypothesis, which states that parental influence depends on whether parents, religious or not, channel their children into schools and social networks which hold the same views (Martin et al. 2003; Pusztai 2015a). Peers in academic settings exert powerful influence in this respect (Pusztai 2006; 2015b). Studies on young Muslim immigrants' religious socialization have found that the network of friends, as well as neighborhood and minority communities, have an even stronger potential for influencing religious socialization (Maliapaard et al. 2012; Lagrange 2014).

change in the social network Religious socialization does not conclude during the childhood years. Religious orientation can take a new turn in adolescence and youth under the influence of peers. In other words, a **change in the social network** can partially or completely change the religious preferences of young people

from different religious backgrounds (Pusztai & Demeter-Karászi 2019). Even those who profess to be religious can experience their faith in diverse ways, for example without any ties to institutions (Davie 2002) constructing their religion in microcommunities (Day 2010) or understanding tenets literally or symbolically (Wulff 1991). Research from the 21st century has revealed that institutions have lesser influence on individuals; instead, religious diversity has led to the dominance of individual decisions. Religiosity based on individual choices can be regarded as the first step towards secularization and the corruption of tradition (as implied by the phrases *à la carte* or *DIY religion* and *hybridization*), but some researchers view it as a sign of increased awareness and of the growing significance of the individual (Dobbelaere 1985; Luckmann 1996; Davie 1999; Rosta & Földvári 2003; Rosta 2008; Rosta 2019).

The analysis of religious socialization from parents' and young people's perspectives has concluded that **religious immobility**, i.e., young generations following their parents' religion, is a frequent phenomenon which results in immobile non-religious and immobile religious children. Intergenerational religious mobility, the outcomes of which are losing one's religion or becoming more religious, occurs more rarely. What accounts for religious immobility in Iannacone's (1998) opinion is that individuals prefer not to discard all their experience, religious human and cultural capital accumulated during their childhood. However, religious immobility is accompanied by the younger generation's innovation, which results in critical, reflective, autonomous, or conveniently tailored forms of religion (Pusztai & Demeter-Karászi 2019).

religious
immobility

TRENDS IN RELIGIOUS CHANGE

Western Europe has experienced the weakening of organized religion from one generation to the next; religious socialization and religious activity have been driven back into the private domain. This confirms the **modernization-secularization** hypothesis, which predicts that in modern societies, the rising level of people's educational attainment is accompanied by a decline in religiosity. However, it remains widespread among low-status, marginalized groups (Pollack & Rosta 2017). On the other hand, over recent decades, changes in the global religious setting have included the evolution of parallel, **multiple modernities** and, in certain areas, even the revival of religiosity alongside modernization (Berger 2014, Casanova 2018). Western Europe is often mentioned as an exception, since modernization there has led to young people abandoning religion (Berger et al. 2008).

modernization-
secularization

multiple
modernities

The above trend, however, has been changed by the permanent presence of generations of immigrant groups who have arrived in Europe to alleviate the shortage of workforce. Those who have arrived in the predominantly secularized western societies from Eastern Europe or outside Europe are much more dedicated to their religion than the local population, and their manner of passing down religion within the family is also different. Families in modern, industrialized societies seem to place little emphasis on their children's religious education, whereas immigrant families are increasingly motivated to maintain the religious tradition in the family. They also feel the need for schools not to restrict their children's religious practice regarding clothing, the use of symbols, and daily routine (Driessen & Merry 2006; Judge 2004; Avest & Wingerden 2017).

Modern Europeans consider religion to be a private matter and an insignificant segment of the complex structure of society. In contrast, immigrant groups are convinced that their children can receive proper upbringing only as members of a community for which religion is a priority. Going beyond simply being important, for immigrant families religion constitutes a system of norms and values and a complex world view which imbues every aspect of culture including behavior at school (Krauss et al. 2005). The reconciliation of these different attitudes is not an easy task. Schools in Western Europe have become "the laboratories of multicultural society" (Avest & Wingerden 2017: 293).

laboratories
of multicultural
society

Post socialist countries are characterized by denominational diversity and a **multitude of religious changes** (Zulehner et al. 2008). The region includes highly modernized and secularized countries (e.g., the Czech Republic) as well as countries with a predominantly religious population (e.g., Romania). Since 1949, the religious affiliation of the Hungarian population has been surveyed twice in censuses with different questions and measurement tools each time. The question in 2001 enquired about citizens' denominational identity, which triggered a positive answer from all those who had once been baptized. Altogether, three-fourths of the Hungarian population named their denomination and one tenth declined to respond. In the 2011 census, the question referred to people's current religious affiliation and membership. The proportion of those who declined to respond had grown to 27% and of those who did not belong to any denomination had increased to 18%. Slightly over half of the population reported belonging to a religious community (Pusztai 2013, Rosta 2020).

multitude
of religious
changes

TABLE 2. Share of the Hungarian population with religious/denominational affiliation according to census data

	2001 What is your religion or denomination?	2011 Which religious community or denomination do you feel you belong to?
Negative response (none)	14.5%	18.2%
Named denomination	74.6%	54.7%
Refused to respond	10.8%	27.1%
Total	10,198,315	9,937,628

Source: Hungarian Central Statistical Office, 2001 and 2011 census data. The question in 2001 was "What is your religion or denomination?", which could trigger a positive answer from all those who had once been baptized, while the question in 2011 was "Which religious community or denomination do you feel yourself to belong to?", which referred to people's current membership.

Of those who belonged to a church or a denomination in 2011, 70% were Catholic, 20% Calvinist (Reformed), nearly 4% Lutheran, and just over 3% Greek Catholic. An extensive organizational structure has evolved throughout the past decades to organize religious events and activities, but it is still clear that religious socialization and worship are not limited to the frameworks of religious organizations and communities.

RELIGIOSITY IN A CENTRAL EUROPEAN COUNTRY

Hungary, a post-socialist country on the border of Eastern and Western Christianity, with multid denominational (mainly Catholic and Protestant) traditions due to having survived an atheistic totalitarian regime, is a characteristic example of the Central European religious context. Until the early 1950s, organized religion in Hungary was more prevalent than before World War II, but in the 1960s the proportion of religious people started to decline, reaching a low in the 1970s. From the end of the decade, the proportion of those who considered themselves religious began to rise (Tomka 1998). The Hungarian population can be divided into three categories with respect to their religious preferences.

Those who are **affiliated to a church** and follow its teaching (Tomka 2010; 1977) or, in other words, those who profess their faith are characterized by regular church attendance, as well as an active or passive (but stable) community membership and participation in the rituals of the church. Despite the large number of new churches and religious movements that were founded after the democratic transition, membership

affiliated to
a church

of either traditional or newly founded small religious organizations has remained below a few percent. Most people who practice their religion are affiliated to the major historical denominations (Roman Catholic, Calvinist, Lutheran and Greek Catholic).

religious in their
own way

The second group, which consists of those who are **religious in their own way**, is more difficult to describe because of the diversity of possible faiths and religious habits. These individuals are characterized by irregular church attendance, higher levels of uncertainty of faith, and loose or completely lacking ties to communities. This form of religiosity is often referred to as cultural religiosity or cultural Christianity (Rosta & Földvári 2004). Such people usually request church services to celebrate their memorable life events, e.g., weddings. There are several distinct sub-categories within this group, including believers who have lost their connection with the church, people who create an individual, selective, à la carte religious faith for themselves, believers who are critical of and keep a distance from churches (Rosta & Földvári 2004), as well as self-critical church members who strictly reflect upon their own religious practice, which is otherwise similar to that of the first group (Pusztai 2006).

non-religious

The third category incorporates the population which can be described as **non-religious** to various degrees, such as non-religious and completely non-religious people as well as those who cannot decide whether they are religious at all. With respect to the other dimensions of religiosity, this group is also far from being homogeneous as, apart from confirmed atheists and people who never engage in any religious practice, it also contains those who are believers in a certain sense and attend church occasionally but regard themselves as non-religious.

The most populous of the three groups is the second one, with almost every second person in Hungarian society claiming to be religious in their own way. The rest of the population – in varying proportions depending on individual surveys – classify themselves as either followers of the teaching of a church or non-religious. (Tomka 1998, Tomka 2011).

THE RELATIONSHIP BETWEEN RELIGIOSITY AND OTHER SOCIAL INDICATORS

At the turn of the millennium, Hungarian society seemed to show considerable differences in religiosity between young and old, well-educated, and undereducated, as well as urban and rural populations, with the latter groups being the more religious ones. However, differences between these groups began to diminish as early as the 1980s, and, apart

from people with the lowest educational attainment, it was the most highly qualified population whose religiosity reached the highest proportion (Tomka 1998, Tomka 2010ab; 2011). This trend continues today, and recent research has shown that the proportion of religious people is rising among people with the highest educational attainment (Hegedűs 2001; Rosta & Tomka 2010; Rosta 2010; Hámori & Rosta 2013). After the turn of the millennium, the proportion of religious young people from high-status families started to increase (Hámori & Rosta 2013, Pusztai 2015c). The 2011 census revealed that the proportion of those who belonged to religious communities was relatively high among the highly qualified population, and the proportion of those with tertiary degrees was higher among young Catholics, Calvinists, and Lutherans than in the same age group without any religious affiliation.

religious
with the highest
educational
attainment

RELIGIOUS CAPITAL AND EDUCATIONAL ATTAINMENT

The relationship between religiosity and educational attainment is an important area of research in the sociology of education. In any part of the world, students from high-status families have much better chances of achieving academic success than others, although belonging to a religious community can enhance the performance of students whose parents have low social status and are not well educated (Pusztai 2006; Pusztai 2015). Religious people's relative advantage in performance is rooted in religious capital, which can be acquired through long-term religious practice (Iannaccone 1998; Finke 2003). This form of capital affects religious families' and students' academic decisions and performance, also yielding its return in educational outcomes and attainment as well as occupational and financial status. The three forms of religious capital are religious human capital, which comprises knowledge accumulated by means of religious practice; religious cultural capital, which is based on familiarity with rituals and customs; and religious social capital, which is derived from empowering, trust-based relationships with members of the religious community, involving exchanges of information and favors. Religious capital affects not only academic attitudes but also life plans and everyday behavior patterns (Pusztai 2007; Fosztó & Kiss 2012; Fényes et al. 2020).

enhance the
performance

We have observed greater willingness to pass down religious faith and more efficiency in its realization in families where parents have high educational attainment. Children who receive religious upbringing at home are more likely to have highly qualified parents. Apart from

the capital acquired through religious practice, this is also because it is easier for well-educated people to make choices from the wide variety of religious and ideological trends. The proportion of children who are religious and affiliated to a church is higher in families where parents who give their children religious upbringing have tertiary degrees than in families where they have lower educational attainment.

In search of resources that can be obtained during religious socialization and utilized in one's school career, sociologists of education have found that the system of religious norms itself may promote social mobility (Weber 2002). The differences in performance deriving from the differences between the norms of individual denominations are yet to be determined (Lehrer 2006). International research has proven that the effects of religiosity and denominational identity on educational attainment **differ by region or religious community** and show alternating patterns in time (Lehrer 2006; McFarland et al. 2011). Other results have demonstrated lower rates of crime and diseases in religious regions (Iannaccone 1998). Religious capital also leads to better performance at school.

Given the parents' educational backgrounds were similar, high school students whose circle of friends mainly consisted of religious peers turned out to achieve better; moreover, the dominance of students with predominantly religious friends in a school also had a positive impact on performance at the school level (Pusztai 2006). The **spillover effect of religious capital** is present if the capital benefits not only religious people, but also their environment. If the proportion of students with religious social networks is high in a school, non-religious students can also profit from their presence (Coleman–Hoffer 1987; Pusztai 2006).

Religious practice has a twofold effect on advancement at school: first, a **direct** effect which transforms attitudes and value preferences; second, an **indirect effect** which reaches individuals through their social networks (Iannaccone 1998; Lehrer 2006). The experiences accumulated during one's religious upbringing exert their influence in skills development and promote the successful interiorization of performance-oriented norms. Familiarity with religious rituals makes it easier for students to adjust to institutional time schedules and role structures (Lehrer 2006; Pusztai 2015). Religious practice in small communities has a beneficial effect on self-expression and creativity; the cognitive aspect of religious education, e.g., Bible study develops reading comprehension and general knowledge; individual practices such as the examination of conscience enhance critical self-evaluation (Pusztai 2015).

RELIGIOUS CAPITAL IN CHILD-REARING

Religiosity has an indisputable effect on child-rearing, but the literature is inconclusive when it comes to the specifics. It is a recurring assumption that family-related anxiety and an authoritarian style of parenting are related to parents' religiosity, but it has not been proven that religiosity is accompanied by a certain style of child-rearing, regardless of ethnicity, denominational culture, or social status (Mahoney 2010). Religiosity essentially determines individuals' preferences of instrumental and terminal values, including educational values, which are arranged along the individual–collective scale. Religious people tend to be closer to the collective end, while in non-religious people's educational principles, individual freedom typically overrides the ideal of solidarity with the community. The differences between the two groups regarding the autonomy – external control scale suggest that children who are brought up in a religious system are emancipated at a later stage than children in non-religious families, where parents are more inclined to attribute moral autonomy to their children at a relatively early age (Pusztai 2013). Among religious people with the highest educational attainment, the significance of individual autonomy is also very high, while collective values also remain a priority. Intersectoral comparison of child-rearing practices has revealed that in denominational primary education, parents' main concern is not controlling their children's academic work but reducing the effects of norms differing from the ones fostered in the family (Pusztai 2015). The **wide range of child-rearing activities**, the time devoted to children, and the strength of the social network that can be mobilized for child-rearing are all characteristics that are associated with favorable social status and the stability of family structure. Nevertheless, religious parents score high in parental attention and care even if their status indicators are unfavorable (Pusztai 2007).

RELIGIOUS EDUCATION IN DENOMINATIONAL SCHOOLS

Denominational schools operated by churches are at the top of the list for scenes of religious education. In pluralistic societies, parents from various socio-cultural groups all aspire to enroll their children in a school with a culture that is compatible with the way the family is socialized (Coleman & Hoffer 1987; Coleman 1990). After the end of the totalitarian era in 1990, the number of families opting for denominational education rose steadily, while the size of the school-age population was decreasing.

Increased participation was due partly to enhanced interest and partly to the institutional expansion of the denominational sector of school providers. The share of this sector remained below 10% until after the turn of the millennium, when it began to slowly increase starting around 2005. The growth accelerated from 2010-2011 to reach 15% by now at the primary level and over 20% at the secondary level. The denominational distribution of school providers corresponds to that of the population: almost every second school is Catholic, one-fourth of them are Calvinist, one in twenty is Lutheran, and one tenth of them are run by smaller religious communities such as Jewish or Neoprotestant denominations, Hare Khrisnas, Buddhists, and Muslims.

regions During state socialism (1948–1990), denominational education comprised as few as 10 secondary schools, 8 of which were situated in central Hungary. Expansion mostly affected the denominational sector in the country as the main trend was to turn to disadvantaged regions and student groups. It is to be noted that the social backgrounds of students at denominational schools are essentially different in the capital and in the country. After 2010, the denominational sector became more prominent in disadvantaged regions and in settlements where other school providers were unable to meet the challenges of operating an institution (Pusztai 2014; Pusztai et al. 2021). Some denominational schools exist in markedly marginalized and segregated dwelling areas. The key culture-specific elements of their pedagogy are creating awareness of transcendently rooted individual and collective values and responsibilities, as well as helping parents with, or involve them in, child-rearing (Pusztai 2015a; Pusztai & Inántsý-Pap 2016).

composition of student population Institutions or types of institutions can be characterized through the composition of their student population. The first comprehensive study of the social composition of denominational school students was conducted at the turn of the millennium (Pusztai 2006). At that time, students who attended denominational institutions were altogether more religious than their age group in general, as only one-third of them came from families not practicing their religion (Pusztai 2004). In 2016, when nearly one tenth of young people aged 16–29 reported attending or having attended church-run educational institutions, data showed that parents who went to church regularly were three times more likely to choose a denominational than a state-run school for their children. Two-thirds of the students at denominational schools were given religious upbringing at home and 60% of them took part in religious education in their own parishes or congregations. Altogether, over 75% identified themselves as religious.

Residents of small towns and children whose parents have a tertiary degree are overrepresented among denominational students. The marked difference between such students in Budapest and in the country has remained unchanged: the number of parents with tertiary degrees is still outstandingly high in the capital. The intersectoral differences in the social composition of schools are due to the relationship between the social composition of the religious and non-religious population in a region. In the capital, it is high-status people who are likely to be religious, whereas in the country, especially in Eastern Hungary, religious people usually have low social status. Nationwide data from 2016 showed that the number of children whose parents had a tertiary degree was 10% higher among religious students, but the same educational advantage of religious students in the capital was threefold.

Denominational schools with a long-standing tradition have their **distinct pedagogical programs and school cultures** which include a wide choice of activities containing a blend of community building and skills development (such as through music or sport) (Pusztai 2007; Pusztai 2015). Some highly efficient schools aim to enlist parents and students' cooperation by establishing both inter- and intra- generational bonds and building trust (Pusztai 2006; Dronkers & Róbert 2004; Pusztai 2015). Parents whose children attend denominational schools are very likely to attribute their children's academic progress to teachers. A larger proportion of them hold the view that education requires real expertise (Pusztai 2013). The learning outcomes of denominational schools which were taken over after 2010 and are dominated by disadvantaged students are approaching those of long-standing church-run institutions with respect to a motivating atmosphere and extracurricular activities if student composition and the effect of the geographical location are controlled for. Moreover, new denominational schools perform better than state-run institutions with a similar student composition (Morvai 2017). However, the fact that a school belongs to the denominational sector does not guarantee the presence of such motivating school culture, because it requires persistent developmental work from teachers, school leaders, and providers alike (Pusztai et al. 2021).

distinct
pedagogical
programs and
school cultures

SUMMARY

Being a major dimension of socialization, religious education cannot be reduced to planned religious pedagogical practices in the classroom. It cannot be reduced to the imitation of a model, either, but must instead be

approached as an individual and collective process of creation. According to research by sociologists of education, religiosity can override the habitus determined by social status, enhancing performance and acting as a protective factor. Religious capital is grounded in the experiences accumulated during religious practice and exerts its influence on academic and other achievements. Religion-based education at school and in the family is rooted in a pedagogy which, being built on trust, strengthens the community and the safety of norms, all of which serve as tools for enhancing academic achievement.

QUESTIONS AND TASKS

1. What are the differences between the reconstructionist and constructivist interpretations of religious socialization?
2. Name and describe the main agents of religious socialization.
3. Describe the major international trends of change affecting religion.
4. What effects does religious capital have on child-rearing and academic performance?
5. Characterize the student composition and school culture of denominational schools.

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Volunteering communities

Social responsibility is not an innate attitude. We might learn about its necessity during formal education, but its mastery is more difficult to acquire. Doing extracurricular work in voluntary organizations and volunteering informally have both played a role in education for centuries. This chapter provides a non-exhaustive list of examples of volunteering. In addition to presenting various types of volunteering, we also provide an outline of national and international trends in young people's volunteering, highlighting the characteristics which increase the likelihood of participation. Finally, during the discussion of the effects of volunteering, we point out that it not only has a positive impact on academic performance but also develops skills and attitudes which cannot be acquired at school but prove useful in life.

Key concepts

Voluntary work: A special form of work which may involve (mostly informal) learning but, at the same time, an activity that individuals, by holding positions and carrying out specific tasks, do in their leisure time of their own free will. The most important attributes of volunteering include it being done out of free will, not being remunerated, and being aimed at the benefit of others (individuals, organizations, or the entire society).

Voluntary activities: Activities done by choice in one's leisure time. Every free-time activity is voluntary, but volunteering is special in that the goods and services obtained are aimed at benefiting others.

Traditional volunteering: This type of volunteering is motivated by solidarity, the intention to help, altruistic attitudes, moral considerations, and a sense of responsibility for the community members who are in need. Traditional volunteering is linked to traditional value orientation and membership in religious or other organizations.

Modern volunteering: This type of volunteering is motivated by gaining experience, professional growth, spending leisure time usefully, and making new friends. Being less altruistic, it is based on self-interest and is related to more instrumental, postmodern, and individualistic value preferences.

Popular with young generations and done by conscious choice, its main motivation is experimental work which gives volunteers a chance to gain experiences and try their hands at new things.

School community service: Despite its compulsory nature, it is intended to model socially responsible behavior, to develop young people's social sensitivity, enhance their civic engagement and willingness to help, and to lay a foundation to volunteering in adulthood, which can become an important component of the work-triad. The triad of work involves various forms of paid work, voluntary work (unpaid and done freely for others), and self-initiated work (done out of free will but not for others, having a subjective meaning and value).

VOLUNTARY WORK AS A FORM OF CIVIC ENGAGEMENT¹³

Volunteering is a special form of work which may involve (mostly informal) learning but, at the same time, an activity that individuals, through holding positions and carrying out specific tasks, do voluntarily in their leisure time. The most important characteristics of volunteering are the following:

- Individuals can be regarded as volunteers if, being motivated, they do non-compulsory work out of their own free will.
- They receive no payment or other material compensation for their work.
- They do work for the benefit of other individuals, groups, or the entire society, i.e., for the common good.
- Volunteering may have intrinsic (subjective, value oriented) and/or extrinsic (instrumental but not directly financial) motivations (Meijs et al. 2003; Wilson 2000; Cnaan & Amroffell 1994; Handy et al. 2010; Dekker & Halman 2003).

Voicu and Voicu (2003) define volunteering through a narrower lense and consider it to be an activity within a formal (organizational) framework. They claim that it is not a commodity, but a voluntary, unpaid activity done for the good of others or the whole of society. Nevertheless, it is not purely altruistic as it is also beneficial to volunteering individuals.

¹³ This section is a revised version of the study by Hajnalka Fényes titled *Volunteering and new type of volunteering among higher education students in Debrecen*. It is published here with the author's permission.

The triad of work involves various forms of paid work, voluntary work (unpaid and done freely for others) and self-initiated work (done out of free will but not for others, having a subjective meaning and value) (Hustinx & Lammertyn 2003; Mutz 2002).

Volunteering is an activity done by choice in one's leisure time. Every free-time activity is voluntary, but volunteering is special in that the goods and services are aimed at benefiting others. This sheds light on the two main principles of volunteering: helping others (altruistic motivation) and helping oneself (the principles of joy or interest) (Van Til 1988). The two motivations cannot always be separated, implying that voluntary activities done for others in one's leisure time serve one's own and others' interests simultaneously (Kaplan 1975).

TYPES OF VOLUNTEERING¹⁴

motivation for volunteering

According to Dekker and Halman (2003), the **motivation for volunteering** can be intrinsic, i.e., based on individual personality traits, such as helpfulness, activity, and generosity, or extrinsic, such as circumstances or other people's behavior). At the same time, both altruistic and egoistic motivations may lead to volunteer activity.

Further distinction is to be made between the objective structural aspect of volunteering and its subjective motivational level. The motives depend on structural differences, social status, one's demographic profile, and the organizational framework, as well as on value preferences, individual reflections, and the nature and strength of one's commitment. A person's demographic status (age, gender, family and financial status, place of residence, etc.) could impose limits to volunteering, materializing in lack of free time, the necessity of earning money, bad conditions for volunteering, being undermotivated, and more. (Bocsi et al. 2017).

Czike and Bartal (2004) studied the motives for volunteering among volunteers of non-profit organizations. They identified eight main categories: (1) helping the poor, (2) gaining experience, (3) religious motivation, (4) challenge and professional growth, (5) a sense of moral duty, (6) spending leisure time usefully, (7) making new friends, and (8) belonging to a community. These motives fall into two main categories.

traditional

Items 1, 3, 5 and 8 are attributes of **traditional** (old-style or collective)

¹⁴ This section is a revised version of the study by Hajnalka Fényes titled *Volunteering and new type of volunteering among higher education students in Debrecen*. It is published here with the author's permission.

volunteering, characterized by a strong religious motivation, an idealistic-altruistic and value-oriented attitude, a sense of community, solidarity, and a desire to help. In addition to being attached to these traditional values, it is also linked with membership in a group or an organization. Items 2, 4, 6 and 7 are attributes of **modern** (new-style or reflexive) **volunteering**, which is based on interests, is less altruistic and more self-contradicting (more instrumental and attached to postmodern values), accommodates diverse value preferences, and is driven by the desire to learn. Popular with young generations and done by conscious choice, it is more individualistic, egoistic, and reflexive than traditional volunteering, its main motivation being creative and innovative experimental work which gives volunteers a chance to gain experiences and try their hands at new things. It does not require long-term commitment but provides variety, as the term ‘revolving-door volunteering’ suggests (Hustinx 2001; Hustinx & Lammartyn 2003), which appears to be attractive to young people brought up in an “experience society” (Schulze 1993) and is in line with their “socialization by experimentation” (Galland 2004).

volunteering

modern
volunteering

As listed above, volunteering can be motivated by both altruistic and instrumental (egoistic) factors. **Traditional volunteering** is based on altruistic motives (it is good to help others) and relies on social interaction and communities. Modern volunteering is motivated by career-building, personal and professional growth, spending leisure time usefully, networking, and gaining work experience. In Hungary, both traditional and modern volunteering usually take place in religious, youth, leisure, recreational (sports), healthcare, educational, professional, and cultural organizations. However, the number of non-profit organizations providing opportunities for volunteering is still low. Volunteers at formal organizations tend to do volunteer work more frequently, are usually of higher social status, and are driven by modern motives, while there is no significant relationship between traditional motives and volunteering outside organizations (Perpék 2012).

Traditional
volunteering

VOLUNTEERING AMONG THE YOUNG GENERATION¹⁵

Individualistic
motives

A large body of research investigates what motivates young people to do voluntary work (Wollebek & Selle 2003; Hustinx 2001, etc.). Traditional altruistic motives (acting for the good of others, benefiting society, protecting one's own and others' interests and rights) are giving way to more self-interested modern motives focusing on gaining professional experience. **Individualistic motives** include networking, meeting people with similar interests and doing leisure and sports activities together, obtaining information, skills development, and gaining work experience.

Wollebek and Selle (2003) have found that, in Norway (and other developed countries), modern volunteering is more widespread, is more specialized, less ideological, and has fewer organizational requirements than traditional volunteering. Whereas traditional volunteering is on the decline, the significance of cultural and leisure volunteering, of organizations supporting sports and people with disabilities, and of neighborhood groups is rising. Modern volunteering offers individuals interesting and rational activities, is action-centered, requires only short-term commitment, and therefore the fluctuation in organizations is high.

Norway, a country with high-level volunteering practices, has seen considerable changes in this sector recently. Volunteering has shifted towards leisure and interest-oriented organizations, which, in Wollebeck and Selle's (2003) opinion, may be the result of changes in individuals' value preferences. Inglehart (1977, 1990) has observed that materialistic values have been replaced by post-materialistic ones such as democracy, human rights, gender equality, self-fulfillment, the protection of the environment, and the importance of leisure time. Putnam (1995, 2000), on the other hand, has found that political apathy is becoming widespread, the number of grassroots initiatives is falling, and, simultaneously, materialistic, and individualistic values are gaining popularity among young people. In his view, the former tendency increases, while the latter decreases the likelihood of volunteering.

Wollebeck and Selle (2003) point out that traditional values play a lesser role in young people's volunteering now, and among older volunteers,

¹⁵ This section is a revised version of the study by Hajnalka Fényes titled *Volunteering and new type of volunteering among higher education students in Debrecen* and of the study by Hajnalka Fényes and Valéria Markos titled *The relationship between higher education students' volunteering and family plans*.

a generation shift is taking place. Their research has also shown that the frequency of volunteering has remained steady, but its relevance to democratic values has diminished.

Putnam's (1995, 2000) research findings in America were reviewed by Inglehart (2003). The study revealed that as a "knowledge-based society" came into existence, volunteering declined among young people but increased among the elderly. The reason might be that volunteering is not favored greatly by young people (life cycle effect), who are also unlikely to volunteer later (generation shift). Putnam claims that volunteering is not on the decline these days, but young people do it within a new, more flexible, and less permanent organizational framework (mostly in charity and sports organizations).

Handy et al. (2010) distinguish three main **motivations for volunteering among higher education students**: career building, altruistic or value-driven motivations, and the protection of oneself and society (volunteers who are driven by the example of others). It is important to note that career-building motives do not necessarily stem from egoism, but rather serve as signals to employers that the person who volunteers is career conscious and more suited for the job than those who have never volunteered. Handy et al. (2010) have found that young generations in the United States and Canada are highly pragmatic and see career building as a top priority. The fact of having done voluntary work is an important signal to employers. Career-oriented volunteers also find altruistic values important, so it is more precise to say that young people's motivations for volunteering are mixed. (Surprisingly, it was not modern but value-driven motives that were the most common among young volunteers in the 12 countries involved in the survey). Handy et al. hypothesized that career-building volunteers partake in volunteering only occasionally and for shorter periods ("revolving-door volunteering", see Hustinx 2001), however this was not supported. In the United States and Canada, young people motivated by career-building volunteered for longer times than those who had other motives (Handy et al. 2010).

motivations for
volunteering
among higher
education
students

Research conducted among higher education students in Hungary has shown that volunteering is gradually on the rise among young people (Bocsi et al. 2017, Fényes & Markos 2019). The number of volunteering students at the University of Debrecen more than doubled from 2005 to 2010, when 26% volunteered during their years of study. However, neither survey showed any gender differences, even though religiosity has a positive impact on volunteering and collective religious practice is more common among women (Fényes & Pusztai 2012). The results were

not affected by male students' better social background, which is supposed to increase the likelihood of volunteering.

A DOMESTIC AND INTERNATIONAL OUTLOOK ON VOLUNTEERING¹⁶

sociodemographic
features

Flash Eurobarometer data from 2015 show that young people's voluntary activities diverge across countries. In the previous year, over one third of the 15–30 age group engaged in organized voluntary work in Ireland, Denmark, and the Netherlands, while the number of volunteers was the lowest in Bulgaria, Greece, and Sweden. In Hungary, 18% of respondents volunteered, which is well below the EU average (25%). Diversity also manifests itself in **sociodemographic features**. Those who leave the education system at the age of 20 or above (having probably obtained higher qualifications) are more likely to volunteer than those who leave school between the ages of 16–19 or even before 15. Willingness to volunteer is lower among those who do physical work in contrast to other occupational groups. Places of residence also make a difference, as young people in rural areas are more likely to do voluntary work than their urban peers. As for age, a higher proportion of the 15–25 age group than of the 25–30 group is involved in volunteering (European Youth 2018).

Hungarian data reveal that after the democratic transition in 1989–90, the number of volunteers began to rise and the sociodemographic composition of volunteers began to change. While immediately after the transition it was men who volunteered in larger numbers, later women took the lead. This is presumably because women bring their helping attitude from home, so volunteering is not the only field they make use of this quality. There are also gender differences in volunteering practices: women do more voluntary work in organizations that give help or care, whereas modern volunteering is more characteristic of men (Czike & Bartal 2004).

Perpék (2012) identified the factors that might influence participation. She highlighted high educational attainment and economic activities as factors supporting voluntary engagement. In addition, religiosity (and especially church attendance) increases the likelihood of volunteering. Regarding educational attainment, it was people with tertiary degrees who did more volunteering at the time of the democratic transition,

¹⁶ This section is a revised version of the study by Hajnalka Fényes and Valéria Markos titled *The relationship between higher education students' volunteering and family plans*.

whereas now voluntary activity is gaining popularity among those with vocational qualifications. The author emphasizes that social capital is an even stronger incentive than sociodemographic factors; that is, volunteerism is positively influenced by extensive social networks, formal and informal interactions, family ties, having more children, religiosity, organizational membership, and trust in other people (Perpék 2012).

There is a strong positive relationship between volunteering and religiosity (Voicu & Voicu 2003; Ruiters & De Graaf 2006; Wilson & Musick 1997; Fényes & Pusztai 2012). Members of religious groups volunteer more frequently than those who are not members. It is partly because church organizations presumably have access to more information about volunteering opportunities, and partly because group members feel a sense of moral duty to help others.

With respect to age, doing voluntary work is gaining popularity among the elderly, especially retired individuals. With respect to family status, it is married people who participate the most. As for places of residence, volunteering is more typical among the rural population than among urban residents.

VOLUNTEERING AND COMMUNITY SERVICE¹⁷

One of the questions that the sociology of education addresses is how education can enhance young people's engagement in social and civic causes, as well as how it can foster their social solidarity. Educational institutions strive to raise students' awareness of social responsibility in a variety of ways, most often through involving students in organized activities outside school. The United States launched "service-learning" programs in the early 20th century, which were later adopted by some European countries, such as France, the Netherlands, and Germany. International experience has confirmed that the education system, even within its formal constraints, is capable of shaping students' citizenship. **School community service** has been a condition of graduation from secondary schools in Hungary since 2011 (Bodó et al. 2018; Markos 2020). It is a kind of "compulsory voluntary work", which can be completed at any state-run, municipal, non-profit, or non-governmental organization that has entered into an agreement of cooperation with the school. In 2016, the number of hours spent volunteering was determined to be 50,

School community
service

¹⁷ This section is a revised version of the study by Hajnalka Fényes and Valéria Markos titled *The effect of the institutional environment on volunteering*.

the documentation of which is a prerequisite for issuing a certificate of secondary education. The survey we conducted among students participating in community service revealed that provided their initial attitude towards community service was favorable, there was a positive shift in their social participation (civic engagement, volunteering, social sensitivity) and career socialization (career orientation, professional embeddedness) even after social background variables had been controlled for. Consequently, developing positive attitudes in students is instrumental in the success of community service (Markos 2020).

Service learning and community service have been integral parts of secondary and tertiary education in Western Europe and the United States for decades. Whereas service learning is incorporated in the curriculum, community service is not necessarily related to school material. It differs from what is known as 'internship' or 'traineeship' in Hungary, in that it does not align with students' fields of study but focuses on doing voluntary work for the common good.

International research into volunteering seeks to determine the student outcome indicators on which volunteering has a positive effect, controlling for social background and other variables. Mabry (1998) has found that the effects of volunteering are influenced by many of its circumstances, such as the duration of the service, whether there is frequent contact with the beneficiaries, whether there is weekly in-class reflection and ongoing written reflection, and whether service experiences are discussed with both instructors and site supervisors. Altogether, the following **positive effects of volunteering** have been found by international researchers (Astin & Sax 1998; Hesser 1995; Eyler et al. 1997; Mabry 1998; Astin et al. 2000):

positive effects
of volunteering

1. Volunteering can have a positive effect on academic achievement and professional development. Students who volunteer have better grade point averages, are more ambitious, perceive a larger increase in their knowledge, are more efficient in improving their learning techniques, and have more intellectual self-confidence. They spend more time studying, more of them take on extra academic assignments, and they have more contact with faculty.
2. Volunteering develops life skills and competencies, social self-confidence, critical thinking, problem-solving, interpersonal and communication skills, as well as conflict resolution and teamwork skills. In addition, it can broaden volunteers' knowledge of other cultures and ethnic groups, improve their understanding

of community-related problems, and bring about positive changes in individual value preferences, goals, attitudes, and tolerance for other groups.

3. Volunteering develops conscious citizenship and social responsibility, builds general trust, widens the acceptance of social justice and fairness, and increases political activity.

These benefits do not affect each student group equally. Academic achievement and career preparation are perhaps more likely to be positively influenced by modern, career-building volunteering (Mabry 1998). On the other hand, citizenship skills and other life competencies are better developed by traditional volunteering. The relationship between volunteering and moral development has not yet been clearly established. Most measurements of competency development are based on self-reporting, so the results might be biased (Gray et al. 1999).

TABLE 3: The effects of volunteering

Individual outputs	Social outputs	Academic outputs	Relationship between students and institutions
students' individual development; perception of increasing individual efficiency; stronger individual identity; spiritual and moral development; interpersonal development; improved teamwork, leadership, and communication skills	discarding stereotypes; a better understanding of cultural, racial, and ethnic groups; improved social responsibility and citizenship skills; increased likelihood of volunteering in the future	better academic outcomes; a better understanding of the real world; facilitating a more complex way of thinking; development of problem handling and critical thinking; cognitive and moral development	improved student-faculty relationship; increased satisfaction with the institution; higher graduation rates

Based on Eyler, Giles, Stenson & Gray (2001)

Qualitative research on volunteering university students has detected the development of conscious citizenship, better tolerance of differences, stronger institutional cohesion, positive attitudes to voluntary work and the community, as well as a more powerful self-image and self-identity (Eyler et al. 2001).

SUMMARY

This chapter has revealed that voluntary communities have acted as influential agents of education throughout history. As the role of volunteering in socialization has become apparent, young people's voluntary participation has, again and again, been promoted and organized within the formal framework of the education system. School community service, which has been introduced in secondary education, aims at enhancing students' social responsibility. Our activity as citizens is a lifelong process, so the long-term effects of volunteering during the years spent at school will become visible only after leaving the formal education system. Membership in voluntary communities and doing voluntary work, apart from their beneficial effect on individuals, also have micro and macro level outcomes, which can be detected both in society and the economy.

QUESTIONS AND TASKS

1. What are the motives for volunteering?
2. What are the main attributes of higher education students' voluntary participation?
3. What are the most important sociodemographic features of volunteers?
4. Which performance indicators are positively influenced by volunteering?
5. What are the similarities and differences between volunteering and school community service?

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Sporting communities

This chapter focuses on the **relevance of sports activities to the sociology of education**. It is important to study sport from the perspective of social sciences and education studies because the significance of sports participation goes beyond its vitality for preserving and improving our health. Sports activities are in connection with other social sub-systems and impact the entire society. The most important question of this chapter is how sport, education, and society are interrelated. The pedagogical aspects of sport and the connection between sport and education are studied by sports pedagogy, the focus of which is how sport educates and what it educates for (Bíró 2020). Apart from this, the sociology of education is also interested in how sporting communities educate their members. When studying the connection between sport, education, and society, we attempt to find out what social and socialization factors play a role in sports participation, how sports activities influence the process of socialization at both individual and collective levels, and how they are related to academic performance.¹⁸

relevance
of sports activities
to the sociology
of education

Key concepts

Sport capital: A special form of cultural capital which includes participants' habitus and the amount and composition of the capital they possess, embodied in certain patterns of behavior.

Sport habitus: The system of behavior, values, and habits necessary for the acquisition of sport capital.

Socialization into sports: Educating people to participate in sports regularly, whereby individuals become familiar with the importance of sport, the opportunities for it, the physical movements, and the patterns of behavior. Initially, it is facilitated by family members, and later by the school, peers, or other persons important to the individual, as well as the media.

¹⁸ This chapter is part of the author's habilitation thesis "*Sport on campus – successful students? The effect of the institution in students' sports activities*".

Development model theory: Participation in sports teaches one to respect hard work and to be persistent, helping in the development of several cognitive skills. It enhances self-confidence, competitiveness, responsibility, and mental endurance. As well as improving social skills, it also helps to form good habits. By reinforcing values and norms, it contributes to regular school attendance and motivates students to perform better in other areas of life as well, which also has a beneficial effect on their academic achievement.

Zero-sum theory: On the one hand, sports activities play an important part in the development of several skills and the entire personality, which all exert a positive influence on academic achievement. On the other hand, sport and other extracurricular activities consume a considerable amount of time and energy, which might hinder performance at school.

SPORT AND SOCIAL INEQUALITIES

social inequalities Apart from **social inequalities** in education, Bourdieu (1991) also investigated inequalities in sport in relation to his theories of capital and habitus. He holds the view that the way individuals spend their free time and the choice and amount of sport they do is contingent on their position in the social hierarchy. To a certain extent, social position depends on the amount of the various forms of capital individuals possess. Capital refers to the forms of economic, social, and cultural resources that individuals acquire to gain status and power through interactions with others in the social world (Wiltshire et al. 2019).

The upper and lower classes have completely different tastes, which is only partly due to the difference in the financial resources they possess. Leisure activity patterns are primarily determined by the habitus of the given social class. Habitus is the system of dispositions that unconsciously influence individuals' thoughts, values, behavior, and interpretation of the world. It is formed through the acquisition of various forms (cultural, economic, social, or symbolic) and amounts of capital. It is class-specific given that members of the same class experience similar situations, opportunities, needs, and events. Furthermore, there is some variance within a social class in terms of leisure activities, consumption, and value systems, which is indicative of habitus itself. Bourdieu (1984) defines lifestyle as the systematic product of habitus, which is in close connection, and even overlapping, with cultural capital. The acquisition of **sport habitus** involves the attainment of sport capital, a special form of cultural capital. **Sport capital** does not only entail special knowledge

sport habitus
Sport capital

and skills necessary for participation in a sport (e.g., familiarity with the rules and techniques), but it also has sociocultural aspects (e.g., familiarity with athletes' networks or the sociocultural context of a sports club). It can be regarded as a special field that contains the combination of participants' habitus and a special amount and composition of capital, which is embodied in certain patterns of behavior. The social context of habitus is shaped by the objective network of social relationships, where individuals compete with one another for resources and position. The tool they use in this competition is capital. Therefore, some individuals attend a sports club because they have a sense of belonging there, while others do not because they say it is not for people like themselves (Bourdieu 1984; Kitchin & Howe 2013; Pot et al. 2016; Stuij 2015). Wiltshire et al. (2019) found similar phenomena during their survey: students at a school told them that although they liked playing football very much, they could not play it at school as this sport was not posh enough for the standards of the school. Children of low social status are more inclined to feel that certain fashionable types of physical activity which are particularly aimed at preserving health are not for people like themselves. Therefore, people from these strata of society will not, and cannot, lead such a lifestyle, which makes these activities (among other things) perpetuate inequalities in health conditions (Wiltshire et al. 2019).

To illustrate this point with an example from sports: the rules and “regularities” of a sports league shape the relationships among stakeholders (fans, players, coaches, teams, owners, governing bodies, the media, and commercial sponsors), which in turn determine the structure of the league. This entire network comprises the **field**. Stakeholders can implement different strategies, depending on the amount of capital at their disposal. Stakeholders with more capital have more opportunity to use their own strategies than those who have less capital. As such, they are more likely to adopt a position of dominance in the field and have it accepted by the others (Kitchin & Howe 2013).

Bourdieu states that leisure and sports activities are determined by three main factors, namely the amount of free time (which is a transformed version of economic capital: a larger volume of economic capital means more free time), economic capital, and cultural **capital**. Depending on the amount of capital possessed by different classes, leisure and sport habits show various patterns. Besides having an influence on the way leisure time is spent, habitus is also a distinctive feature of each social class, so it defines and strengthens class identity. The upper classes can be characterized by such exclusive activities as sailing and golf, whereas

team sports like handball and basketball are typical of the middle classes. At the same time, body building, wrestling, and boxing are the most widespread among the working classes. However, exceptions do exist, in that no activities can be restricted to a given social class (Bourdieu 1991).

Sports activities not only increase cultural capital but also contribute to the accumulation of symbolic or social capital. Similarly, the lack of economic and cultural capital might exclude people from sports and could also lead to less social capital. Joining sporting communities helps individuals establish new relationships, which increases their **social capital**. However, if these communities are too closed off, certain social groups may end up being marginalized (Kitchin & Howe 2013).

THE EFFECT OF SOCIAL BACKGROUND ON SPORTS PARTICIPATION

Social exclusion – in sports as well as in all other areas of life – is linked to low socioeconomic status, poverty, unemployment, and a low educational attainment. This means that disadvantaged social groups are permanently trapped in a lifestyle without much physical exercise. In a broader sense, social exclusion from sports activities affects a much wider range of the social spectrum, including groups that suffer disadvantage based on gender, age, place of residence, or disability (Spaij et al. 2015). In Southern, Central, and Eastern Europe, only a small fraction of society has the opportunity for regular physical activity, while the majority experience **exclusion from sport**. Moreover, these societies are becoming increasingly divided with the diminishment of middle classes and the expansion of lower classes, which makes access to sport even more limited. This calls for urgent institutionalized and organized intervention. Furthermore, it has become more expensive to partake in sports, which results in the total exclusion of several disadvantaged groups. Generally, people seem to have lost interest in sports activities (Dóczy & Gál 2015; Müller et al. 2019).

The effect of parents' socioeconomic status on whether their child does any sport is ambiguous. Some studies give examples of families' socioeconomic status having no effect on their children's sports activities (Stuij 2015; Pot et al. 2016). In a study conducted among primary school children, Stuij (2015) found that high-status children were more likely to participate in sports activities organized by clubs outside the school, whereas low-status children generally engaged in unorganized outdoor activities. These findings confirm Bourdieu's theory of habitus (Stuij 2015).

Our earlier research conducted among university students in Hungary and Hungarian minority institutions in neighboring countries revealed that only a low proportion of students participated in sports regularly. Across these regions, the frequency was slightly below once a week. Looking at the social and individual determinants of sports participation together, we found that there were marked inequalities regarding gender and financial status in Hungary, Romania (to the greatest extent), and Ukraine. The strongest driving force for sports participation was preserving health and – in the Hungarian sample – interest in competition and victory. The more these values were esteemed by the students, the more motivated they were to participate in sports (Kovács 2019a).

research
conducted
among university
students

THE PROCESS OF SOCIALIZATION INTO SPORTS

Socialization is a life-long learning process during which individuals acquire the values, norms, and behavior patterns of their social environment. They acquire skills to fit into various communities such as the family, school, workplace, or society as a whole. The skills, values, and rules learned during sports activities can be utilized in other areas of life, like at work and school, or in family life. (The next section of this chapter will provide more detail). Sport is more than an efficient way of developing physical and motor skills; as a recreational activity, it also has a favorable effect on interpersonal relationships. For example, when entering a new environment during a life transition (like starting the freshman year in higher education), sport can act as a helpful aid to adapt to a new environment (Bíró 2020). **Socialization into sports** means educating young people to do regular physical exercise. It is primarily done by the family, and later by the school, peers, other persons important to the individual, and the media. During socialization into sports, individuals become familiar with the importance of sport, the opportunities for it, the physical movements, and the patterns of behavior (Coakley 2007).

Socialization into
sports

Snyder and Spreitzer (1981) draw a distinction between two aspects of the relationship between sport and socialization: socialization into the unique world of sports and socialization through sports. Research into the former focuses on the physical, mental, and social-interpersonal factors which influence participation in sports activities (described in detail in the previous and present chapters). Research into the latter studies the consequences of doing sports, such as the effect of sport on academic

the relationship
between sport
and socialization

performance (to be discussed later) at both individual and social levels. Socialization into sports involves the internalization of values like self-definition, determination, fair play, competitiveness, or the appreciation of hard work. However, socialization does not exclusively have positive outcomes as sports participation does not always improve self-confidence, leadership skills, or social relationships. Since socialization is multi-dimensional, other factors like peer groups, non-sports activities, and the media also play a part.

Socialization into sports

Socialization into sports is illustrated with Figure 4 by Côté and Hay (2002, cited by MacPhail et al. 2003). They divide the process into the three phases of sampling, specializing, and investment. Each phase can have three outcomes: (1) transition to the next phase, (2) dropping out from sports, or (3) informal participation in sports for recreational purposes. In the sampling phase, children are motivated by the pleasure of physical activity and playing freely, as opposed to the hard training or practice. In the specializing phase, individuals limit the variety of their sports activities by deciding which sport they intend to continue. In the investment phase, athletes focus on one single sport and are committed to intensive training and succeeding at competitions. Pleasure as the main motivator in the sampling phase is replaced in the specialization phase by the pleasure of the excitement caused by competitions and achievement. Socializing children into sports too early or forcing them to advance to the next stage too early may lead to burnout (MacPhail et al. 2003).

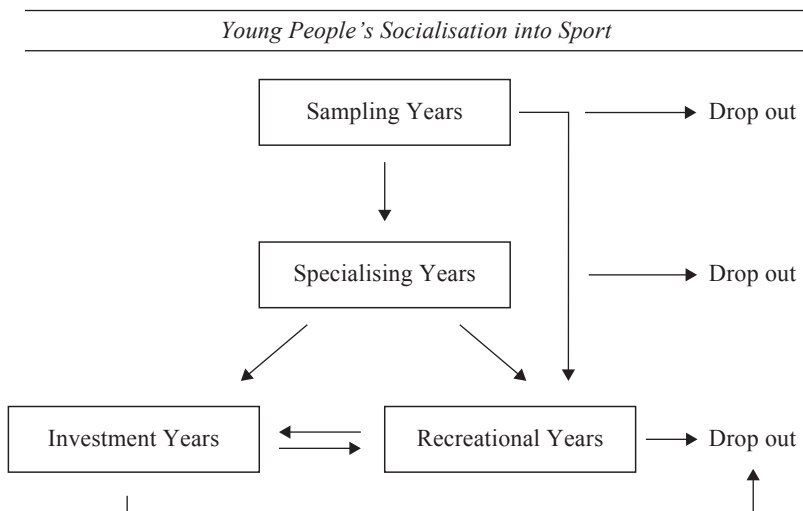


FIGURE 4. The process and phases of socialization into sports.

Source: Côté and Hay 2002, cited by MacPhail et al. 2003

The **interpersonal aspect of sport** becomes manifest in several ways. Firstly, sport can consolidate existing relationships when, for instance, a person starts to play a sport because somebody close to them encourages them to exercise together. Whether it is an organized activity or not, the important thing is that people participate in sports together to keep fit or for the joy of a shared activity.

interpersonal
aspect of sport

Secondly, inside a sporting community, it is likely that people start to bond informally. If the same people meet regularly at the same place, they will sooner or later get to know one another, and come to like or dislike their peers. Thanks to the shared activity, it is possible to form life-long friendships or even romantic relationships. Individuals' first experiences of sport are crucial in determining whether they will continue for a lifetime or live without physical exercise. Therefore it is extremely important to have positive first experiences and, consequently, to realize the value of sport. A good start – similarly to lifelong learning – can lead to lifelong physical activity. The experiences gained through one's first encounter with sport can override the advantages or disadvantages arising from gender and sociocultural or sociodemographic background (Kirk 2005). This is where socialization into sports connects with Bourdieu's theory of capital: it follows from the above that belonging to a sporting community increases social capital.

The success of socialization into sports depends on how early it takes place in a person's life. Bourdieu points out that socialization into sports is also strongly influenced by the family and the sociocultural and economic context of its social network. It is not by chance that low-socioeconomic status families do not participate in sport so actively; however, it is not only due to their financial status and limited opportunities for sport, but also to the habitus of their close social environment (friends, relatives, peers, and school) (Bourdieu 1984; Stuij 2015; Pot et al. 2016).

Based on Bourdieu's theory, Bernstein created a useful theoretical framework to help the understanding of socialization into sports. He distinguished between **the instructional, regulative, imaginative, and interpersonal contexts**, in which socialization takes place. The instructional context offers the technical skills and knowledge for people to be able to play a sport. Socialization in the regulative context means the acquisition of the (moral) knowledge related to social interactions and relationships. The imaginative context provides experiences about the knowledge acquired. The interpersonal context helps individuals to internalize values and emotions related to a sport. Bernstein's theory sheds light on the interaction between the micro and macro levels of sport

the instructional,
regulative,
imaginative, and
interpersonal
contexts

habitus. It states that the technical aspects of sport capital are provided by the instructional context, while its sociocultural aspects are accessible through the regulative and interpersonal contexts (Bernstein 1974, cited by Pot et al. 2016).

AGENTS OF SPORTS SOCIALIZATION

Sports activities of family, friends, classmates, fellow students, and teachers can constitute examples to be followed by individuals during their social learning. As such, these lend themselves to be examined from the perspective of social cognitive theory. **Bandura's social cognitive theory** (1989) holds that individuals' life paths and decisions are determined by the social and interpersonal settings they belong to. The behavior patterns of socialization agents (family, friends, peers, schoolmates) have an impact on individuals' subsequent behavior and attitudes. Certain events ("encounters"), which have a lifelong impact on opinions, attitudes, and views of life, hold a similar significance.

Bandura's social
cognitive theory

the primary agent
of socialization

As it is widely known, **the primary agent of socialization** is the family, as children learn behavior patterns by imitating their parents or other relatives. In families where sport is a popular activity and a common topic of conversation among parents and the extended family, and it is "consumed" in various forms (attending sports events or watching sports on TV), children are more likely to develop a positive attitude towards physical activity. To use Bourdieu's term, the family has strong sport habitus. The choice of a particular sport, which usually follows an initial general interest in sports activities, is undeniably determined by the family's socioeconomic status, but several other factors such as educational institutions, peer groups, the media, and government campaigns/programs can play a part in creating and maintaining an interest in sports (Pot et al. 2016).

Children from low-status families are less likely to participate in sports (Stuij 2015; Wiltshire et al. 2019). Nevertheless, regardless of social status, parents play a key role in shaping their child's attitude towards sports activities. Motivation usually comes from parents' or other family members' (grandparents' or uncles') commitment or earlier sports careers. Introducing their children to the importance and values of sport and the experiences it provides, as well as taking them to training sessions and rooting for them at competitions all display **parents' sport habitus**. The regulative context is indicated by how parents introduce their children to the world of sport, while the interpersonal context includes

parents' sport
habitus

parents' value systems, as well as their opinions and knowledge of their children's sports participation. They strongly influence how the social aspect of their children's sport capital is shaped through their knowledge about sport, the trust between them and the sports club, its members and the coach, and through supporting their children in their commitment to sport. The difference between high-status and low-status children regarding the imaginative context is that children from unfavorable sociocultural backgrounds are less likely to join sports clubs. Therefore, their opportunity to gain experience (and social capital), is limited to the streets and parks of their neighborhoods, whereas the reverse is true for high-status children: their experience is limited to sports clubs as they do not engage in the outdoor activities of their low-status peers. The atmosphere of sports clubs, for example a tennis club, is largely determined by its members' habitus. They are frequented by high-status people and avoided by the lower segments of society because they feel they "do not belong there". This is how children from different strata of society acquire sport habitus, which might remain with them for a lifetime, generating (sport) capital in a special (sport) field (Stuj 2015; Pot et al. 2016).

Teachers have an undisputable role in promoting the physical and spiritual well-being of the next generation through educating them on how to lead a healthy lifestyle in a school setting which offers positive health behavior patterns. Their work is indispensable to creating a pattern of regular physical exercise in their students, helping them develop a liking for it, and raising their awareness of the importance of healthy leisure pursuits. However, an international survey revealed that in Central and Eastern Europe, as well as in some parts of Britain, physical education classes which followed an excessively strict curriculum had a negative impact on students' self-determined (or autonomous) motivation (Fintor 2015; Soos et al. 2019).

Teachers role

The role of peers as a reference group is of increasing significance both throughout adolescence and in young adulthood (Pusztai 2015). Peers make physical activity more enjoyable through shared joy and achievement, recognition, and raising one another's self-esteem. The perception of friendships developed in the context of sport – and of existing friendships – has a positive effect on adolescents' attraction to physical activity, on taking the final step to take up a sport, or, possibly, on advancing in a sport career (MacPhail et al. 2003). On the other hand, it might also lead to giving up sports activities. The most important motivation is the joy experienced while doing sport together, the absence

peers

of which might result in the abandonment of sports participation. In this way, peers also influence one another's (sport) habitus (Pot et al. 2016).

HOW SPORT SOCIALIZES: THE RELATIONSHIP BETWEEN SPORTS PARTICIPATION AND ACADEMIC PERFORMANCE

the effect of sports activities

One of the most important research areas of the sociology of education is identifying the factors which influence academic performance. Similarly, **the effect of various sports activities** on different dimensions of academic performance is a central research area if sport is studied from the perspective of the sociology of education. There are two different approaches based on two questions: first, what factors prompt individuals to start doing sports (see the sections above); and second, what effect sports participation has on academic and non-academic performance (Eitle & Eitle 2002). Research on the relationship between sports participation and academic performance (especially of upper high school and higher education students) has been inconsistent, as some studies have found a positive relationship (Dyer et al. 2017; Donnelly et al. 2016) and others have established a negative one, while others have found no link at all (Din 2005).

To be able to interpret these results, we need to consider what is learned through sports activities and how sport plays a role in the socialization of individuals.

development model theory

The development model theory holds that participation in sports develops personality by teaching individuals to respect hard work and to be persistent. It also improves several cognitive skills and enhances self-confidence, competitiveness, responsibility, and mental endurance. Additionally, it helps to form good habits by reinforcing values and norms, it contributes to regular school attendance, and motivates students to perform better in all of life, which also has a beneficial effect on their academic achievement (Broh 2002). As an indirect effect, it strengthens bonds among students and between the school and parents. It is also a tool to promote social integration, cooperation between diverse groups, and tolerance (Artinger et al. 2006). All these have a positive effect on performance.

the positive effect of sporting habits

Our earlier research conducted in the Hungarian-Romanian border region confirmed **the positive effect of sporting habits** on academic performance. Students involved in competitive or leisure sports performed the best in almost all categories, and the aggregate results were the best for competitors, proving that students involved in competitive sports were still able to do excel academically in university. Students involved in

leisure sports were the most likely to adhere to academic norms, to find a point in studying, and to prepare for classes and exams exhaustively (Kovács 2015).

Coleman (1961) points out that through extracurricular activities like sport, young people become more easily accepted in their groups, have more authority, and fulfill major roles among their peers. Thanks to the popularity of sport, they can form closer relationships with their parents and teachers. In this way, they accumulate social capital, which is beneficial to their academic performance. Nevertheless, if the time devoted to sports hinders one's studies, it results in a **zero-sum situation**. Sport and similar extracurricular activities divert a great deal of time and energy from studying (Eitle & Eitle 2002).

zero-sum situation

Research that has not found any link between sport and academic achievement supports **Coleman's theory of social capital**, which has different implications in secondary schools and in tertiary education. In secondary schools, student athletes are widely recognized, and their achievements are acknowledged by teachers and fellow students alike. Their popularity earns them relationships and a great amount of social capital, both inside and outside of an academic setting. In contrast, the social networks of student athletes in higher education are limited to their sporting communities, segregating them from other groups and decreasing their social capital and institutional embeddedness (Pascarella & Terenzini 2005; Pusztai 2015; Tinto 1975; Kovács 2018; Kovács 2022), has a negative effect on their academic performance and increases their risk of attrition. The popular stereotype "**dumb jock**" described this phenomenon (Bowen & Levin 2003). As dumb jocks spend most of their time with their fellow athletes, they are likely to separate themselves from their non-sporting peers. At first, they just often find themselves left out, but later they deliberately shun collaboration and conversation with their peers. Consequently, they are less likely to engage in meaningful relationships with their non-sporting peers or lecturers, which would be instrumental to gaining new intellectual experiences. They become less involved in class work and more inclined to think of their studies as secondary to their sports activities (Watt & Moore 2001).

Coleman's theory of social capital

"dumb jock"

A further reason for the neutral or negative effect of sports participation is **the influence of social background factors** (such as socioeconomic status, family roles, age, and home environment) or of psychosocial variables on performance indicators (Donnelly et al. 2016). Research has shown that several talented low SES students (e.g., African Americans) who, by virtue of their sports achievement, are given sports

the influence of social background factors

scholarships to study in higher education, perform poorly (and often did so back in secondary school) due to their social status (Eitle & Eitle 2002). These results have been produced through diverse methodologies and measurement tools, with or without controlling for mediating factors (Donnelly et al. 2016).

SUMMARY

This chapter has addressed sports participation from the perspective of the sociology of education. We have described the effects of certain social factors on participation in sports activities by applying Bourdieu's theories of capital and habitus to sports and supporting the validity of the theory with empirical results. We have also presented the two-directional process of sports socialization. First, we have linked socialization into sports to the theory of habitus and to socialization agents. The last section of the chapter has addressed socialization through sports. We have discussed the educating function of sport and its effect on academic performance.

QUESTIONS AND TASKS

1. What parts of Bourdieu's theories of capital and habitus apply to sport?
2. Which social factors play a part in sports participation?
3. Define the concept of sports socialization.
4. What are the determinants of sports socialization?
5. Present the theories on the relationship between sports participation and academic performance.

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Communities interpreting the media

The role of the media in socialization cannot be ignored if one considers education in the Durkheimian sense, namely that education incorporates all processes which, conveying the human ideal in a society, mold individuals into social creatures. The transmission of knowledge and information is generally thought to be the main function of the media and, furthermore, the sociology of education regards the media as an important channel of social learning needed for integration into society. Moreover, it is one of the most influential agents of education on the societal scale through its appeal to the masses, its heterogeneity, and transmission through technology (Gálik 2002). The concepts of exposure and selective exposure to media, which are dominant paradigms in media studies today, suggest awareness of the fact that spontaneous, unplanned influences have a greater significance than conscious learning, in a similar

Key concepts

Informal learning: Learning that takes place in our everyday lives as part of life-long learning. It is the least institutional form of learning and involves knowledge gained from the media. The learning process can be either intentional (self-directed learning) or incidental, during which individuals do not realize that their knowledge has increased. For example, learning is intentional when people learn how to use a new software from YouTube. It is incidental when a friend demonstrates how a device works, people hear an interesting historical fact during a conversation, etc.

Two-step flow model of communication: Information, opinions, and views reach the general public through opinion leaders and their interpretations. Opinion leaders are either experts in their fields or prestigious persons of reference in their communities, under whose influence other people change their opinions.

Interpretive communities: Media consumers jointly give meaning to a media message by virtue of belonging to the same community. For example, series fandoms not only interpret what they watch but also use the elements of the series to reinforce their collective identity.

way to other fields of education. As such, the study of the media is an integral part of a textbook on the sociology of education.

COLLECTIVE LEARNING THROUGH THE MEDIA

Everyday learning with the help of mass communication devices is generally classified as informal learning (Fenstermacher & Cuthbert 1989). Buckingham (2019) states that the media is educative in nature, whether the programs in question are newscasts, Discovery Channel documentaries, the Jerry Springer Show, or the cartoon *Pokemon*. Media consumption, including the use of mobile phones, which are on the way to becoming teaching aids, is classified as **informal learning** within the process of life-long learning by researchers (Field & Leicester 2003). The social aspect of learning from the media means that recipients consume and process information from the media as a collective activity, whereby learning from the media is incorporated into social learning. In other words, individuals learn as members of a community through their continual interaction with other members (Kozma 2018). Informal learning is embedded in social relationships and takes place within the social context of specific situations, in which ideas and thoughts are shaped jointly by participants (Marsick et al. 2017). Students can form interpretive communities to create a common interpretation of the world of education and its goals. They can adopt various patterns of behavior, which either stimulate or hinder their academic achievement and careers. Among student communities in higher education, the ones which are bound together by the discussion of political and art topics, as well as reading experiences, have been found to be the most efficient (Pusztai 2015). Learning **in a community** can have stimulating power for individuals in many respects. Lave and Wenger (1991) describe legitimate peripheral participation as an element of the learning process: in the beginning, newcomers are positioned on the periphery of the community, but, with time, they inevitably become fully-fledged members on their way to adopting the entire sociocultural practice of the community, which is demanded by the nature of the knowledge and skills it passes on. Such learning communities were named communities of practice (Lave & Wenger 1991). The concept of the 'zone of proximal development', created by Vygotsky, also points to the role of the social environment in learning. A supportive social setting, aids in enhancing individual development and serves as the engine of learning in real or virtual communities (Vygotsky 1978). Zumbach (2010) has observed that exchanging and discussing

informal learning

in a community

information in a community result in cognitive flexibility. Rorty (1991) highlights that knowledge evolves through negotiation among members of society, through exchanging information, and learning about others' judgements of it. Accordingly, it is important to exchange the outcomes of learning with one's social environment and for becoming acquainted with different viewpoints (Savery & Duffy 1995). The process also works reversely: **interaction** in working teams and other communities often generates learning (Billett 2002). Formal communities can turn into informal ones if their members share norms, cultural values, and ideas, which shape individuals reciprocally (Wenger 1998). The theory of situated cognition holds that individuals' thoughts and actions gain meaning only in the surrounding context, i.e. learning is always dependent on the situation. A **supportive learning environment** has a significant impact on understanding (Reimann-Rotheimer & Mandl 2006). Van Evra (2004) underscores the social aspect of learning, especially in the reception of motion picture content. Viewers have an influence on one another while watching together, and those more interested in the topic can help others stay focused (Van Evra 2004). The joint consumption of the media indisputably has its impact as opinions are exchanged, information is completed, and a shared interpretation is created and consolidated. An interpretive community facilitates comments and the adjustment of information. Brosius et al. (2010) divide **learning from the media** into three phases: (1) the pre-communicative phase, before the encounter with the media content, having no effect on actions, (2) the communication phase, or reception, during which the media content triggers cognitive processes in consumers (attention and the processing of information) and changes their psychological states (stimuli or emotional influences), and (3) the post-communicative phase, which involves real-life action in the wide social context (family, friends, other groups, and society) as a result of cognition. The phenomena in the final phase are known as macro effects (Brosius et al. 2010). In Gorton's view, the media has become an integral part of people's everyday lives, being not only a background factor but a focal point and a social tool in the sense that its diverse content serves as a conversation topic (Luke 1997; Gorton 2009).

The internet has brought about profound transformation in the world of the media. As a result of **media convergence**, most media consumption (television, radio, newspapers/sites) takes place online. In the early 2000s, it was widely believed that internet blogs would supersede certain forms of the mainstream media (see Griffith & Papacharissi 2010), and even though that has not happened, the internet has gained substantial

interaction

supportive
learning
environment

learning from the
media

media
convergence

ground. The number of Americans who primarily watch TV for news and information on scientific innovations has been on the decline since 2001, whereas the number of Americans who use the internet as the primary source of information is rising steeply. This trend is most typical of young people, who are at the forefront of internet use, while the elderly still prefer to consume traditional media platforms (National Science Board 2020).

In addition to traditional, mainstream printed, and broadcast media (Brossard 2013), the online world has also developed a kind of “**informal publicity**”, which reaches a consistently increasing mass of users and is responsible for an ever-growing amount of content (Szvetelszky 2017). Due to its appearance, the amount of information available has rocketed become overwhelmingly unmanageable. It is often troublesome to verify content and trace its authors and sources (Veszelszki 2017). Such community-based “informal publicity” also influences learning from the media: there are countless educational and instructional videos on YouTube (see also Brossard 2013). The present online world has a strong collective character, with a more active and unprecedented participation of the public in running the media (Glózer 2017). Videobloggers form **online learning communities** by attracting followers, who can make comments on the content and discuss the information they have accessed.

“informal publicity”

online learning communities

THE FUNCTIONS OF THE MEDIA

INFORMATIVE AND EDUCATIVE FUNCTION

The mass media has a significant educative and informative purpose. Mass communication has three main general functions: **information**, **education**, and **entertainment** (Singha & Roger 2012). Kardos (1980) assigns a major role to motion pictures in education, as films are capable of presenting reality as a moving and changing process, which can provide a much more complete understanding of the world than direct perception. Thumim (2006) points out that, as early as in the 1950s, commercial television companies set out to educate and inform their audiences in addition to just airing commercials. The UNESCO’s MacBride report in 1980 highlighted the educative potential of the media as one of its key roles. It made a distinction between formal educational materials (used in the school system) and informal ones (intended for adults, farmers, and those who lack technological knowledge) (MacBride 1980). Giroux

information, education, entertainment

(1999) raises the idea of “public pedagogy”, suggesting that the media fulfills a pedagogical role for the public. The educational function of the media is also underscored by other research, which emphasizes the role of the internet and of phones capable of playing videos (Share 2009). Agrawal (2000) regards the media as an important tool of learning languages and the meanings of various cultural symbols. Jacke and Winkel (2008) call attention to the fact that mass media content, also available outside formal education, may broaden students’ perception through means such as familiarizing them with various aspects of body language or developing their concentration skills. Even entertainment and news programs add a high amount information to media users’ knowledge (Buckingham 2019). Barbier and Lavenir (2004) believe that one of the primary functions of the media is **spreading knowledge** as well as entertaining and providing information. McQuail distinguishes four roles of the mass media: entertainment, political socialization, consumer socialization, and education. Additionally, media also fulfills the task of enlightening the public (McQuail 1987). In Buckingham and Scanlon’s view, entertainment becomes mixed with some other functions of the media, producing **edutainment**, which means education in an entertaining way (Buckingham & Scanlon 2020).

THE MEDIA IN COMMUNITY CULTURE

Researchers studying adult education and culture address the idea that the media plays a significant role in conveying culture and knowledge for the community (Cazeneuve & Oulif 1972; Szeckső 1985). Mass media content shapes individuals’ attitudes towards culture and is instrumental in transmitting the message of culture, art, and science to laypeople (Maier et al. 2014). It is among the main contributors to the formation of culture with respect to symbolic forms, fashion trends, customs, lifestyles, norms, values, and branches of art (Kapitány & Kapitány 2006). The UNESCO’s MacBride report emphasizes that the mass media serves as a cultural “warehouse” from which works of culture are forwarded. However, the report also warns of the dangers of the excessive commercialism prevalent in the media, which can deprive culture of its real meaning (MacBride 1980). The mass media, especially some its professional institutions (such as the public service media) are considered by several authors as parts of community culture alongside cultural institutions (libraries, museums) (Bényei & Ruttkai 2018).

THE MEDIA AS A MEANS OF SOCIAL LEARNING

The media is an important agent of Kozma's **social learning** process, during which individuals acquire the culture needed for their integration into society. Media plays a part in socialization by transmitting values, behavior patterns, norms, and cognitive models. Providing social norms and cultural behavior patterns, it is a secondary socialization agent for not only young people but also adults (Rosengen 2005). Share (2009) points out that the omnipresent media **teaches "lessons"** about life, such as what to think of different groups of people. The media presents stories which help integration into society and finding one's place in the world. Although such stories used to be spread through oral tradition, through myths and tales, and later in writing, now it is the media where they mainly appear and are disseminated (Gerbner 1998). Some researchers have concluded that film series convey valid social and gender behavior patterns to viewers (Thumim 2006). Kósa (2001) also highlight the phenomenon of acquiring **behavior models** from the media. In line with Bandura, they have found that when one must adjust to new requirements, one is likely to turn to behavior patterns exemplified by some media content (Kósa 2001). Thumim also mentions that popular series, dramas, and magazine shows contribute to the development and acceptance of certain forms of behavior (Thumim 2006). Gerbner states that the mass media stimulates, and at the same time controls, the spontaneous formation of norms. It can offer new behavior patterns, warn of the obsolescence of certain norms, and recognize new needs that are to be controlled (Gerbner 1998; Gerbner & Gross 2003). Television and films also play a role through the formation of national identity (Harvey 2006; Gripsrud 2017). The media has potential to influence young people's political thinking and thereby affect their future civic participation. It teaches democracy, shapes patterns of social behavior, and helps people develop their identities (Dewey 1966; Kellner 1995; Gripsrud 2017; Share 2009). Sándor refers to research findings which prove that the mass media influences individual opinions and attitudes and can even alter one's political views. It **shapes personality**, helps individuals to get to know and understand the world, and find their place and role in it. Films serve as a powerful impetus to viewers' ideological and moral attitudes (Bodag & Hamisch 1987; Jacke & Winkel 2008).

social learning

teaches "lessons"

behavior models

shapes personality

POPULAR CULTURE AND SOCIAL LEARNING

Among the genres of the professional media industry, it was television series that stood out with their impact and popularity between 2010 and 2020, representing the renewal of the television era. Previously, series were approached by media research from the perspective of media texts and representations, i.e., the impact of the world represented in the media. In this interpretation, the audience is merely a passive receiver, whose view of reality is actively shaped by the media, an “educator” often accused of being biased. Media representations often ignore (or give a negative representation) of certain social groups with lesser capacity for self-assertion such as women, the elderly, or ethnic and sexual minorities. Because of the excessive depiction of violence and sexuality, the media can be held responsible for the escalation of violence in society and the growing threat unprivileged groups face (Gerbner 1998). Ever since the 1980s, postmodern media research has examined the media of the late modern age from a different perspective: from that of its capacity for reviving the activity inherent in mass culture. In other words, the question is not what the media does to the people but, instead, what people do to the media (McLeod et al. 1991). The reason why popular culture, along with its popular genres such as series and video clips, matters so much to the audience is that it gives publicity to private themes while also creating the opportunity to experience subversion and resistance, and to search for alternative answers as well. According to media researchers of cultural studies, the audience takes an active part in the discussion of the reality presented by the media, which also includes the value systems of society. Media users, through the consumption of media content, fulfill their own pleasure-driven inclinations and enrich their identities by interpreting the meanings of popular culture based on their personal imagination (Ang 1985). A typical example is Madonna, the star of the 1980s-1990s, whose videoclips, growing beyond their musical significance, exhilarated and empowered fans – thanks to the Madonna phenomenon. As John Fiske sees it, Madonna’s clips enabled young girls to re-interpret female identity, accept themselves, and publicly discuss former taboos related to femininity (Fiske 1995). Media content has come to be judged by its performativity; that is, the significance of media products is determined by the scope they offer the audience for connecting to them. Their popularity, whether they receive any attention from the public, and their potential for maximizing profits all depend on whether the audience can connect to them emotionally and whether they reflect media users’ personal needs (Myat 2010).

One of the novelties of the postmodern media era is **fandoms**, which are communities that consist of the fans of a series. Fandoms are not only held together by obsession with a series, but also function as interpretive communities which jointly interpret, and even expand, the world of the series. In his analysis of the behavior of Star Trek fans, Henry Jenkins called fans “textual poachers”, who cherry-pick the elements that appeal to them in media texts and use them to reinforce their identity, entertainment, and group membership. Always on the lookout for new texts, they recommend, interpret, and give additions to what they find. They view their own popularity and personal worth through the feedback from the fandom. In Jenkins’ opinion, they create alternative subcultures and milieus which shape culture (Jenkins 1992). The appearance of interactive digital media has widened fans’ scope of action further. The new media provides free access to series without any time limits, which makes it easier for fans to produce, remix, and disseminate new content. The audience is on its way to becoming **prosumers** (producers of content) who can make further contributions to the fictional world of a series, which spans over various forms of media in the transmedia universe. However, fandoms seem to be losing their counter-cultural role while, in contrast, as media companies’ partners, as generators of maximum income, and occasionally, as youtubers (opinion leaders/influencers), they are becoming the beneficiaries of the success of series (Gollowitzer 2011).

The customized, temporally unlimited supply transforms consumer behavior. The time of viewing is no longer set by the media provider but is entirely up to the consumer. A new type of series viewer is emerging: the series geek, who is not attracted to a certain series but to the genre itself. The geek is also extremely knowledgeable about the world of series, but is not necessarily a fandom member, for whom media consumption is a collective experience. Nowadays, series are recommended to viewers based on their viewing preferences by algorithms, making communities superfluous (Gollowitzer 2011).

The lack of time constraints makes one prone to be insatiable. While traditional television governed viewers’ daily routines and portioned new episodes one by one, permanent online access to television has given rise to binge-watching, a new style of viewing: viewers watch several episodes or even an entire season in one sitting (Srđan 2018). This may have an adverse effect on concentration and might even lead to sleeping disorders.

None of the theoretical frameworks outlined above have lost their validity. To understand the relationship between the media and the audience,

one must consider different theoretical approaches in different media and social contexts, with special regard to circumstances of reception.

to raise media awareness

In order to raise media awareness in young people, educators have to take into account media users' age characteristics and the fact that value systems and role patterns are still in the making, which leaves them more vulnerable to the influence of the media than adults, who already have a more solid value system and are more experienced. Moreover, one must be aware that, because of the nearly unlimited (unconstrained by age, geographical location and time) access for users to interactive digital media platforms, parental restrictions and legal regulations are no longer able to protect children (and oneself either) from the traps and threats posed by the media. Therefore, the only solution is to develop children's media awareness and critical thinking from an early age in order to ensure their healthy, safe, and successful functioning in the world of the media.

INFLUENCERS IN SOCIAL MEDIA

Already at an early stage of research, studies on the effect of media on socialization questioned the direct and linear influence of the media on the receiver. According to the two-step flow of communication model, it is opinion leaders who diffuse media content, mainly because the public has limited access to it. The theory holds that information and opinions are first received from the mass media by opinion leaders, who in turn pass them on to the general public. In addition to the actual content, opinion leaders also pass on their own interpretations (Katz 1957). The two steps refer not only to the two steps of access, but also the two steps of influence, or possibly of the changes in attitude and opinions brought about by a reference person who is either an expert in the field or popular with the community. Today's digital media landscape facilitates one-step communication, but two-step and complex multi-step flow models of communication are still valid.

two-step flow of communication model

The 20th century saw a shift from the one-way influence of the media on the audience to active use and interaction (Marwick & Lewis 2017; Bradshaw & Howard 2018). This is especially true now, in the era of interactive media. The real breakthrough was brought about by web 2.0, the advent of social media in the 2000s, a time since when community members have been able to interact directly with one another, with larger groups, and organizations. User behavior has been changed by broadband internet services, customized access to content, and mobile media platforms which are accessible everywhere and even enable content

active use and interaction

production. The role of media in socialization is what follows this change. The questions that media research has focused on so far are yet to be answered: how values and models are transmitted with respect to roles and actions in one's personal life, in the family, in micro-communities, and in society; with respect to violence and sexuality; with respect to forming consumer habits; and with respect to the authenticity of the information that affect our decisions.

The one-way influence of traditional media has been altered by the high **interactional potential** and the direct, participatory character of the **new media**. The question of personal credibility, the significance of which was underscored by media research as early as in the 1950s, has received increased attention recently. According to Katz and Lazarsfeld's **two-step flow of communication model**, personal communication has a stronger influence on opinions than mass communication. The change in voters' behavior drew attention to the fact that it was the key members (opinion leaders) of micro-communities, under whose influence political opinions were the most likely to change. These individuals, considered influential by their communities, are well-informed and attract followers by virtue of their charisma. They not only pass on but also interpret content, in addition to being knowledgeable about the most common themes of the media (politics, consumption, culture) (Katz & Lazarsfeld 1955).

interactional potential of the new media

two-step flow of communication model

Opinion leaders in social media are called influencers, who can share their views with a much wider audience today than at the time of traditional media. Influencers can exert powerful influence on other people's decisions on account of being viewed as persons of authority, knowledge, or connections (Csordás et al. 2014). They are followed by masses in social media. Their significance is also researched by economic experts, because the role of influencers has turned the world of marketing upside down. Their credibility, which is based on the fact that they share information coming from their personal experience, is a sensitive area. There is a delicate balance between their seemingly full autonomy and serving the interests of the market and of the companies which market their products. The role of influencers is somewhere between that of celebrities and self-appointed amateurs aspiring to fame. They target certain age groups, and since their popularity is based on adoration, they mainly attract teenagers and young adults. Usually starting their careers as bloggers or vloggers, they work hard on building their images as experts of certain highly popular everyday fields (fashion, gaming, lifestyle, hobbies, etc.). They set an amiable, humorous tone, giving the impression that they are one of us. They exert their influence in the same

way as stars in series, who are present as parasocial companions in their fans' everyday lives with their regular appearance and friendly gestures (Glózer & Guld 2015).

echo chamber

Since social media functions as an **echo chamber**, influencers play an increasingly important role in political socialization and in forming public opinion. Audiences tend to lock themselves up with like-minded people, echoing the group's opinion, which is even amplified by the **filter-bubble effect** generated by algorithms. Several people hold the view that this phenomenon poses a threat to democracy (Pariser 2011). In such an environment, influencers have an increased impact. As Habermas observed earlier, opinion leaders in the public sphere – which is where the internet belongs – have a great influence in special fields such as religion, science, and politics (Habermas 1996). The power of influencers can either be used well or be misused. The role of influencers is increasingly often examined from the perspective of social, scientific, and educational communication.

filter-bubble effect

MANIPULATION BY THE MEDIA

critical attitude

One needs a **critical attitude** when consuming media content. Often guided by commercial interests, editors do not refrain from manipulation to boost their audience statistics. Manipulative tricks may also be used in educative-informative content, so a critical attitude is necessary in this area as well. Modern visual technology (e.g. CGI – Computer Generated Imagery) facilitates the blending of fiction and reality (see Jeffries 2003; Dijck 2006; Wolf 1999; Metz 2008; Morton 1999; Darley 2003; Scott & White 2003). It might also occur that those who give expert opinions have questionable credibility or expertise in the given field (see Metz 2008; Parker 2009). The media sometimes gives a false picture of science and scientists' work, depicting them to be much more exciting than they actually are, almost like action film characters (see Dornan 1990; Palfreman 2002). In certain documentaries, examples of real manipulation can be detected. For instance, León observed in nature documentaries aired on National Geographic that firstly, they were made about charismatic species that capture the most attention (e.g. tigers, lions, and sharks), and secondly, the films only contained the most spectacular scenes and pictures, giving an edited picture of the real lives of animals (León 1999). In their content analysis of the series "*El Hombre y la Tierra*" (*Man and the Earth*), Deogracias, and Mateos-Pérez found that 64% of the footage showed the animals during feeding and hunting, when, in reality,

they spend much less time engaging in these activities (Deogracias and Mateos-Pérez 2013). A specific instance of deceit is mentioned by Barnouw in connection with the 1922 documentary “Nanook of the North”, where the directors made the main hero build an igloo which was much larger than usual, and thus served only as a decoration. In this way, the film reconstructed, rather than presented, reality (Barnouw 2005). The series titled “The Crocodile Hunter” set some scenes in a pool instead of the wild, displayed animals outside their natural habitat, and even used editing tricks when reality did not appear to be exciting enough (Chris 2006).

The presence or absence of a **critical attitude** is crucial especially because various video sharing (e.g., YouTube) and social sites abound in pseudoscientific videos. Now, in the age of the internet, it is possible for everybody to create such “documentaries” and make them available online to a large audience. They endanger science insofar as they may contain unverified information, given that there is no scientific control behind them, and neither are there any experts taking responsibility for their content and guaranteeing their credibility. Such pseudo-documentaries can be classified as “**user generated**” content. They are home-made, quasi “amateur” videos, which can be produced by anyone who has adequate technical equipment without the assistance of professional editors. A survey showed that over 30% of the millennial generation’s media consumption consisted of such content, which turned out to be 35% more memorable for them than other content. It was also typical of this group of users that their trust index exceeded that of users who consumed other media content, which is due to the fact that user-made content may evoke a sense of “being one of us” (Ipsos 2014, cited by Dóbbé & Rózsás 2017).

All the examples above illustrate that the various educative functions of the media are not to be ignored, whether it is traditional (radio, television, printed press) or online media content.

QUESTIONS AND TASKS

1. Compare formal, non-formal, and informal learning.
2. What are the characteristics of informal and social learning done through the media?
3. How can the ritual and instrumental role of the media be interpreted?
4. What roles can series play in socialization?
5. How can influencers affect student attitudes and performance?

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Communities at Work

This chapter begins with discussing the role of work in the family and the role of schools in educating their students to work. Next, we present the main stages of socialization into the workplace and of career socialization, during which individuals choose their careers, familiarize themselves with the labor market, and prepare to adjust to the workplace. We also describe the role of part-time student employment in career socialization and in the transition from education to working life. Finally, we list the key characteristics of paid student work and its effects on academic performance and career choice.

Key concepts

Student employment: Paid work done by full-time students of secondary or tertiary education during term time or vacation. It can be facilitated by various organizations such as student employment agencies, which ensure that students work legally and under controlled circumstances. In some education systems, educational institutions offer or help to organize work opportunities for their students.

Work values: The formation of work values has two stages. The first stage is the time of socialization before employment, when individuals' work value preferences are shaped by the family, and later by the school, peer groups, and the media. The second stage is related to the experiences gained while doing paid work. The literature offers various typologies of working values. There is a simple dichotomous distinction between extrinsic motivation, which includes predictable employment, a regular salary, good working conditions, and regular holidays, as well as intrinsic motivation, which considers work as a vocation and a source of joy. In recent years, the typology of work values has undergone further differentiation on the individualistic – universal (collective) scale.

Socialization into the workplace: The process starts with an anticipatory phase in which individuals collect and evaluate information about their prospective workplaces, interpret the requirements of their future positions and the demands set by the employers, and build up their own expectations

about their workplaces. The next step is making a decision about one's employment.

Career orientation: The process, shaped by both formal and informal education, during which individuals prepare for choosing a career and familiarize themselves with working life. Career orientation can be regarded as the first phase of career socialization, which is influenced by individuals' aspirations formed in the family subculture, their rational calculations, value preferences, work attitudes, motivation, and concepts of their own abilities.

Transition to working life: The lengthening period between graduation and labor market entry, with multiple transitions between educational institutions and workplaces, unemployment, and even household work. In this period, student and employee status can alternate constantly.

“WORK OR SCHOOL” REPLACED BY “WORK AND SCHOOL”

Doing work is an important component of education outside school, and work experience can have a significant effect on the success of school socialization and academic performance. Owing to the consolidation and expansion of education systems, an increasing number of students spend an increasing number of years in the school system, which also has an impact on their daily routines. Participation in education appears to have diverted young generations from working on the family farm or in the family enterprise, which might give the impression that student work is on the decline (Deáky 2015). Many people hold the view that the only duty of youth is to study. However, work is present in young people's lives, albeit in different ways and to a varying extent, and it might even play a dominant role for some. Young people's lifestyles are characterized by the shifting balance between the three main pillars of study, leisure, and work. From time to time, work can become a dominant factor for certain student groups. **Student employment** is paid work done by full-time students in secondary or tertiary education during term time or vacation. It can be facilitated by various organizations, such as student employment agencies, which ensure that students do work legally and under controlled circumstances. Now, nearly two centuries after the establishment of public education systems, which included entire age groups, student work, whether paid or voluntary, is gaining ground and having an impact on young people's school careers. When studying the effect of student employment on academic performance, researchers are recommended to consider the constellation of factors which increase the

Student
employment

frequency of doing paid work and strengthen its effects, in addition to the characteristics of the work being done.

WORK AND WORK CULTURE IN THE FAMILY

The primary agent of education is the family as a community. Every family has its own subculture with a system of activities, experiences and norms. Family subculture can be interpreted through the family's lifestyle. The objective components of **lifestyle** include the family's financial status and income, as well as the division of labor within the family (Kozma 1991). Another important indicator is the parents' educational attainment, which determines family members' social status and their position in the division of labor in society. The latter is crucial to children's future careers and is also closely connected to the family's income level, which provides a certain standard of living and a position in society for the whole family. Young people's visions and expectations about their future careers are largely shaped by the type and amount of work their parents do to make a living, as well as by the amount and quality of the time they can afford to spend away from work. Behavior patterns such as the **division of labor** in the family are entirely different in families where parents are blue-collar workers and in families where parents do white-collar work. A further component of family subculture is the value system, in which work is a major point of reference (Kozma 1991).

It follows from the above that socialization into working life does not start by taking on one's first full-time job, but by observing one's parents in childhood and storing key information for one's future views, attitudes, and values related to work. Parents' employment and economic background have a major influence on their children's attitudes to work. They also become familiar with conventional occupational gender stereotypes through their parents' perceptions of occupational roles (Loughlin & Barling 2010; Medved et al. 2009). Students' concepts of the masculine or feminine nature of housework largely depends on the cultural setting. In families with a higher level of gender equality, housework is also shared equally between the sexes (Kosakowska-Berezecka et al. 2018; Schneider 2012). Cultural diversity is reflected in occupations, household work, and leisure activities alike (Zhou et al. 2004).

Work values belong to the core of a culture, as work is a key factor in each civilization. They are the secondary motives for activities, determined by socialization, cognition, needs, and experiences (Kooij et al. 2011). The formation of work values has two stages. The first stage is the

time of socialization before employment, when individuals' work value preferences are shaped by the family, and later by the school, peer groups, and the media. The second stage is related to the experiences gained while doing paid work, and is either grounded in the first stage or can take an entirely different course due to specific circumstances (starting a family, personal qualities, opportunities) (Ester et al. 2006; Duffy & Sedlacek 2007; Bocsi et al. 2017).

According to a widely known typology, work values, which are ranked during anticipatory and actual socialization into the workplace, can be divided into **extrinsic and intrinsic work values**. Extrinsic motivation includes predictable employment, a regular salary, good working conditions, and regular holidays. It is rooted in a materialistic value system, which aims for a satisfactory living standard and a predictable way of life, and regards work as a means to an end. By contrast, intrinsic motivation considers work as a vocation and a source of joy. It can be traced back to a post-materialistic value system, which is centered around autonomy, opportunities for development, challenges, performance, and initiative at work (Ester et al. 2006; Bocsi et al. 2017).

extrinsic and
intrinsic work
values

Schwartz (1999) worked out ten value typologies based on different motivations and identified four high-order value types. The first one is openness to change (independent thought and action, curiosity), the second is conservation (conformity, tradition, and security), the third is self-enhancement (social status, prestige, and achievement), and the fourth, going beyond the horizon of the individual and focusing on collective, universal values, is self-transcendence (altruism, a creative and meaningful vocation) (Krumm & Hertel 2012).

One must not ignore the influence of institutions on work values, which is in direct proportion to the difference between the work values of individuals or certain social groups and those of institutions. Internship or activities related to the labor market induce a socialization process, which may direct students towards different paths at different stages of their education. Work values are also shaped by fields of study, opportunities of employment, and salaries (Bocsi et al. 2017).

SOCIALIZATION INTO THE WORKPLACE

Being employed in a part-time job is probably not a student's first contact with paid work (Loughlin & Barling 2010); however, the workplace is undoubtedly an important scene of socialization. According to certain theories, formal, non-formal, and informal socialization processes take

place parallelly, and the workplace plays a part in non-formal socialization (Kozma 1991; Weidman & DeAngelo 2020). There is a view that the most important outcome of socialization into the workplace is not personal change but finding one's position in the social hierarchy and acquiring the corresponding ideologies (Loughlin & Barling 2010). Several models describe the **process of organizational (workplace) socialization**. These models usually identify three distinct stages: anticipatory socialization, encounter, and metamorphosis (Feldman 1976). Jablin (2001) has proposed the fourth stage of exit (disengagement), which means the termination of the organizational process. The first step of socialization is anticipation: forming expectations about the workplace, receiving and evaluating information about it, and, finally, making decisions about employment (Feldman 1976). Anticipatory socialization can be divided into two stages: **organizational anticipatory socialization** and **vocational anticipatory socialization**. During the former, jobseekers and employers exchange information that influences employment decisions and mutual expectations. The latter refers to the process of understanding the behavior patterns and organizational culture of a workplace as well as the expectations related to occupational roles (Jablin 2001).

Research into **vocational anticipatory socialization** deals with secondary school students' experiences about their part-time employment, and their vocational anticipatory socialization (Greenberger et al. 1982; Dailey 2016). Part-time employment is crucial to young people's socialization into the workplace, since this is a period when students observe considerable changes in themselves: their views of work are transformed, and they re-evaluate their self-efficacy. An important message of recent research is that young people's employment is not only an economic exchange, but, along with a working environment abounding in novel interactions, it is also a prospective field of education (Herrygers & Wieland 2017). Besides families' views of work, it is part-time employment that might exert the greatest influence on future employees' work values and attitudes (Loughlin & Barling 2010).

Thus, young employees' anticipatory socialization includes reflection on experiences gained at educational institutions, at career counselling, and during part-time work, as well as indirect effects such as work attitudes and values, being trained – at school and in the family – to work, or receiving information about the labor market from parents, other adults, peers, and the media (Dailey 2016).

Anticipatory socialization is a complex learning process that prepares entry to working life. In a later phase, it also contributes to organizational

socialization through individuals' attitudes and personalities. Organizational and vocational anticipatory socialization is followed by entry to the organization, which marks the beginning of a new phase (Feldman 1976). Several studies have been conducted on how newcomers are integrated into an organization and what efforts they make to fit in (Dailey 2016). Newcomers, faced with a complex situation, are usually uncertain about how to behave in the new workplace setting. Whereas management and colleagues inform new employees about the organization and its roles in a manifest way, following a given "curriculum", the most relevant information about organizational roles are obtained through spontaneous interactions at the workplace, as if a "hidden curriculum" were followed. Socialization into the workplace can be considered successful if a new employee understands the culture of the given organization and becomes an active participant in it (Van Maanen & Schein 1979; Schein 1988).

VOCATIONAL ANTICIPATORY SOCIALIZATION IN THE EDUCATION SYSTEM

Career orientation is an individual's preparation for career choice and for accommodating themselves to working life. It can be looked upon as the first stage of career socialization, in which individual motivation and abilities play a major role. This is when commitment to the vocation is formed, and, during vocational training, theoretical and practical knowledge is gained, which is indispensable to career acquisition. After training, individuals become career mature and are ready to start a career. In the starting phase, it becomes clear whether individuals can cope with the challenges of the career of their choice. If they can, they will develop a sense of vocation, which helps them persist in their careers. It is also in this phase that individuals become familiar with every aspect of their profession with its advantages and disadvantages (Szabó 1994). Vocational socialization and one's path in the labor market not only depend on vocational training and its agents, but are also influenced by family, peers, colleagues, and career maturity.

Career orientation

Career maturity is attained through doing actual work, which is an important element of becoming an expert in one's field. Professional commitment can be developed as early as in higher education or in the phase of anticipatory socialization, with a special focus on a motivating environment and increased involvement (Astin 1993; Ahmad et al. 2011).

Career maturity

Investigating the relationship between education and working life, as well as the socialization effects of vocational training and internship,

are important areas of research (Kiss 2016). All over the world, higher education institutions face the challenge of adjusting their courses to their students' needs in the job market. It is a peculiar contradiction that, while the task of education is to prepare students for work, the culture that educational institutions foster is entirely different from corporate culture. Internships provide a more realistic picture of working life than traditional forms of anticipatory socialization (Dailey 2016). Education requires the thorough acquisition of professional knowledge using one's cognitive skills, but a separate career phase is to be dedicated to the adjustment of taught and expected knowledge (Kiss 2016). Dual training, extra-institutional alternatives, and internships are all important fields of career socialization (Pogátsnik 2018). Dual training educates future employees in two fields at the same time: theoretical training takes place in an educational institution, while practical training is provided by a company. The project-based work which trainees often participate in is suitable for complex social learning, which helps young people develop their soft skills, work independently, and integrate into corporate culture (Simonics 2015; Török & Kovács 2015).

TRANSITION TO WORKING LIFE

The fact that in recent times an increasing number of young people have started doing paid work with increasing frequency is due to both the expansion of higher education and the current changes in economic life and the labor market (Kocsis & Pusztai 2020). However, the structural transformation of the global economy and work has made the transition from education to work more problematic. During the transition period, young people may repeatedly enter and leave education, paid work, unemployment, and household work in multiple ways, alternating between the status of student and employee (Heinz 1999). It varies by country how the **education-to-employment transition** is handled and supported. In some countries, national and cultural traditions serve as a solid foundation for a well-structured transition, while in other countries, it is a less organized and lax process. In the United States, the part-time employment of high school students, a new phase of the transition, has become an organic part of the system. By contrast, in Germany, Japan, and similar cultures, owing to their different conditions, the part-time employment of young people is part of a relatively unstructured transition. Job seeking and finding employment are not uniform experiences, as young people are a heterogeneous group with diverse social and family backgrounds,

education-to-
employment
transition

experiences, and visions of the future, and, likewise, their entry to the job market also shows considerable variation (Heinz 1999). Some young people find employment through their connections, but many of them lack the social capital to do so. Establishing useful connections and finding a job can be a turning point for young people from disadvantaged sociocultural backgrounds (Heinz 1999). Combining work and study helps today's youth to develop the skills needed in the job market and makes the transition from education to employment shorter and smoother (OECD 2015).

STUDENTS IN THE LABOR MARKET

It is not only young people's upbringing that shapes their views of work but also their part-time employment during the years of study. For several decades, the international literature on education research has dealt with the question of doing paid work during studies and has found that student employment is on the rise (Pascarella et al. 1998; Perna 2010; Riggert et. al. 2006; Teichler 2011). At first, student work was regarded by educational institutions as detrimental to academic work but was later looked upon as an important complement of training, which promoted practice-oriented education and a smoother transition to the job market (Pusztai & Kocsis 2019).

Student employment can be considered as a **place for learning**. In recent years, even students from secondary education have been actively involved in the job market, which can be explained by several factors such as financial reasons, gaining work experience, becoming independent of parents, and covering the costs of leisure activities. Students' work-related decisions may affect not only their present or future employment, but also their attitudes towards their studies (Kocsis 2019).

a place for
learning

Employing young people has become the norm both in Europe and the United States. The part-time employment of high school students has become routine in the United States with nearly half of the age group working. By the time of graduation, most students have already been involved in part-time work (Loughlin & Barling 1998; Pascarella et al. 1998; Perna 2010; Singh 1998; Riggert et. al. 2006). In 2012, a comprehensive international survey across 23 countries was carried out on young people who combined work and study (OECD 2015). It found that that 39% of 16-29-year-old students worked, but there were considerable differences across countries. Combining work and studies was the most common in English-speaking countries, where over half of the surveyed students reported doing so. This practice was also

supported by the long-standing tradition of apprenticeship in these countries. Student employment was less common in Italy, the Czech Republic, and Belgium, where less than one fifth of young people worked. Students in higher education were more likely to work than secondary school students except for countries where apprenticeship contracts were part of secondary education (e.g., Germany and Denmark). Student work took place either within the structured system of apprenticeship or at workplaces outside vocational training. In Estonia, Germany, France, and Austria, at least 50% of working students did work related to their fields of study, whereas in the USA, Korea, and Japan, barely 40% did so. Students who pursued studies in the fields of healthcare, education, languages, and art were the most likely to do paid work (OECD 2015).

International research has shown that the frequency of, and motivation for, doing paid work are related to students' socioeconomic backgrounds (Masevičiūtė et al. 2018; Pusztai 2013; Pusztai & Kocsis 2019; Warren et al. 2000). In general, as parents' level of education increases, the likelihood of combining study and work decreases (Perna 2010; Warren et al. 2000). In addition, the higher their parents' educational attainment, the more likely students are to be motivated by professional (rather than financial) reasons to engage in paid work (Masevičiūtė et al. 2018). EUROSTUDENT VI data have revealed that students in the Balkan countries start working for financial reasons. By contrast, in countries where higher education studies are generously funded by the state (Denmark, Norway, Sweden, Finland, and Malta) and students are not required to pay tuition fees, they can use their earnings to raise their living standards as well as to cover their basic living expenses. In several countries (Italy, the Czech Republic, France, and Georgia), gaining professional experience is a more common motivation than financial necessity. Most students report that they could not afford to study in higher education without an additional income. Similarly, a very large number work in order to gain experience. The least typical motivation is the need to support someone else financially (Masevičiūtė et al. 2018).

THE RELATIONSHIP BETWEEN DOING PAID WORK AND ACADEMIC PERFORMANCE

The effect of student employment on academic performance has been studied since the 1980s. It has been found that paid student employment decreases the amount of time students spend on studying, leisure, sleeping, and housework by 80% (Kalenoski & Pabilonia 2009). Permanent work

also increases the likelihood of attrition (D'Amico 1984; Szűgyi 2015). attrition
Some researchers maintain that 20 hours per week is the threshold above which student work can be detrimental to performance, while others think that as little as 5 hours per week can have a similar effect (Loughlin & Barling 1999; Vickers et al. 2003). Student employment has a negative effect if it does not promote academic advancement, but instead diverts students from school attendance, which might lead to increased absence, early school leaving, and attrition, especially among low socioeconomic-status students in vocational education (Szűgyi 2015). On the other hand, there are studies confirming that decades later, even employment during secondary school can have a positive effect, namely on participation in the labor market, employment status, and income (Mortimer 1994; Ruhm 1998; Carr et al. 1996; Vickers et al. 2003). According to Hungarian surveys on the expectations of students in secondary education about their further studies, students expect to avoid unemployment, have a steady job, build a career, and be able to have summer jobs or work abroad. Evidently, plans for higher education and a later career do not contradict each other (Kispálné Horváh & Vincze 2009). Students understand that choosing the right institution of higher education and gaining early work experience may yield ample returns in the long run.

Research on the effect of paid work on higher education students' academic performance has produced inconclusive results (Pascarella et al. 1998; Perna 2010; Riggert et al. 2006). On the one hand, it has been found that work can be a risk factor that perpetuates social inequalities and increases the likelihood of attrition (Darmody & Smyth 2008; Kocsis. & Pusztai 2020). On the other hand, there are findings suggesting that work is a supporting factor that helps to form identity, enhances academic commitment, and has a positive effect on future labor market performance (Perna 2010; Rothstein 2007).

CAREER CHOICE AND YOUNG PEOPLE'S POSITION IN THE LABOR MARKET

There is a large body of international research concerning the factors that influence career choice. It has been found that career choice goals career choice
are influenced by parents, peers, teachers, social relationships, cultural background, and academic subjects (Auyeung & Sands 2010; Singaravelu et al. 2005). As we have mentioned, the transition to working life has become insecure and young people must conquer new challenges at the start of their careers (Grosemans et al. 2017). The most serious problem is that young

jobseekers who have adequate qualifications and can adapt to changes in the job market often find themselves left out of it. As participation in higher education expanded, incongruent employment increased and the value of qualifications decreased in the labor market. Based on the relationship between the qualifications obtained in the education system and occupation, we can make a distinction between horizontal and vertical alignment. Employment in a position that corresponds to the level of one's qualifications means vertical alignment; employment that corresponds to the field of one's qualifications means horizontal alignment; and, if there is no alignment, employment is incongruent. The value of qualifications in the labor market depends on usable professional knowledge as well as on the ability to acquire knowledge and adaptability (Kiss 2016, Zerényi 2017). Graduates trained based on a theoretical focus have difficulty finding employment. The solution may lie in curriculum development and the synthesis of theory and practice. Employment opportunities can be enhanced by more practice-oriented teaching, providing opportunities for field practice, collaboration between faculty and employers, as well as by helping graduates become self-employed (Pusztai & Csók 2020). Kiss (2016) has conducted research to identify the key factors to finding a job that aligns with one's qualifications. Her findings confirm the importance of professional work experience gained while working as a student. Work experience outside one's profession does not have a significant effect on the duration of job seeking, albeit some employers may acknowledge it as an advantage. What employers prefer is language skills, professional development, and work experience, especially if it has been gained abroad or in the discipline in question. These credentials suggest that the new employee's work will result in increased productivity. If work experience comes from outside of one's chosen field, it might reduce the chances of alignment, as the experience young people have gained and the connections they have established might increase the likelihood of leaving their original careers (Kiss 2016). Research results also emphasize the importance of gaining work experience during studies, adding that the best investment is doing work related to one's field of study (Fényes 2021). Student work, especially during tertiary studies, also contributes to forming an identity as it strengthens commitment to completing one's studies and the ability for self-regulation, and, through its impact on personality development, it promotes academic performance and success in the labor market, raising student employment into a higher value dimension (Perna 2010; Pusser 2010). In this sense, part-time employment supports the idea that the workplace is a scene for learning.

QUESTIONS AND TASKS

1. How does the family influence young people's attitude towards work?
2. What are the stages of socialization into the workplace?
3. Characterize the relationship between education and the labor market during the phases of vocational anticipatory socialization and starting work.
4. What effects does paid student work have on academic performance?
5. Why is it important for future teachers to be familiar with the problem of combining work and study?

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KATINKA BACSKAI

The Professional Community of Teachers

This chapter deals with the factors that affect teachers' professional lives, starting from the time of their career choice (i.e., a high school graduate's decision to enter teacher training) to the peak of their careers.

Key concepts

Beginning teacher: There are two possible ways to prepare teachers for their actual work at the start of their careers. The first and more widespread one is to have a period of teaching practice (usually a year) in the last year of studies at university. The other way is to be mentored after employment by an experienced senior colleague who is qualified for this task.

Status of teachers: In Europe, the employment of teachers follows two basic patterns (and combinations thereof). One is the status of public servant, which means that employment is essentially independent of the status of the school, e.g., in terms of remuneration. In the other model, teachers are employees who have an employment contract with a local authority or the school itself in accordance with labor market conditions.

Unified pay scale for teachers: a scheme that calculates teachers' salaries on the basis of their qualification and experience, without regard to individual achievement (relative to the extent of the challenge), working conditions, or the amount of energy invested by the teacher.

Student-teacher ratio: Class size is one of the most popular areas of research. Research can focus on the absolute size of classes and other student groups, but most large-sample studies (including PISA) use student-teacher ratio, which indicates the average number of students for each teacher. This is the key measure of teachers' workload.

Teachers' workload: The time that teachers spend working can be divided into three parts: time spent teaching in the classroom, non-teaching time spent in school, and time spent on school-related tasks (e.g., correcting students' work, preparation, self-development) outside school. The last one is very difficult to measure and there are considerable individual differences.

THE APPEAL OF THE PROFESSION

To meet the demand for teachers who can cope with the ever-growing challenges of the profession, it is necessary (i) that teacher training degree programs be chosen by dedicated, high-ability students, (ii) that they receive high-quality training at university, and (iii) that these well-qualified young graduates start their careers in the teaching profession and not elsewhere. Choosing teaching as a career is usually influenced by three factors: remuneration (starting salary and the prospects of rises), working conditions (job security, career prospects, and working environment), and social prestige. Although, in practice, these factors are linked to one another, in theory they are separable.

ATTRACTING GIFTED STUDENTS TO THE PROFESSION

First, the success of teacher training depends on whether there is a sufficient number of dedicated and high-ability students enrolling in such degree programs. The relevance of this has been shown in the United States (Manski 1987), the United Kingdom (Chevalier & Dolton 2004), Australia (Leight & Ryen 2008), and Italy (Barbieri et al. 2007).

Experience has shown that in countries such as Scotland, Ireland, Sweden, Finland, and Iceland, where the prestige of teaching is traditionally high, teachers are well paid, and have good career prospects and working conditions, applicants for teacher training have good skills and abilities. In contrast, where the above conditions are not fulfilled, high-achieving students do not opt for teacher training and a teaching career. This is especially true for students in the fields of sciences and IT, as their professional knowledge is highly valued in the labor market.

teacher training

The last two decades have seen significant changes in **teacher training** in all European countries (except Estonia, Italy, and the Netherlands, where only minor reforms have taken place). The curriculum of teacher training institutions contains courses in academic subjects, education theory, methodology, and a period of teaching practice. Regarding the structure of the courses, there are two systems in place: **concurrent training**, where academic and educational subjects are studied side-by-side, and **consecutive training**, where courses in academic subjects are followed by educational and methodological courses (Coolahan 2002; Szabó 1998).

concurrent
training

consecutive
training

One of the major problems of teacher training is that students are unable to put their theoretical knowledge into practice, so training does not meet the requirements set by future employers. To address

this problem, there was a tendency in Europe around the turn of the millennium for teacher training institutions to be given more autonomy to develop their own course content, methodology, and curriculum. As a result, teacher training has undergone a shift from time spent at the university towards practice. However, students still seem to require more practical training: they find even the number of teaching practice hours laid down in the Bologna system too few and consider the training still too theoretical (Jancsák 2011).

Bologna system

The teaching profession could be made more attractive by introducing higher and stricter standards in teacher training. However, there have been instances when these measures produce the opposite effects. Up to the late 1990s, the duration of teacher training had substantially increased in Europe, yet, since the 2000s when some Western European countries started to experience a shortage of teachers, requirements for entering the profession have been relaxed. In the Netherlands, for example, first the standards of teacher training were raised, and salaries were increased, then, as soon as teachers were in short supply, requirements were relaxed. After that, it was expected of in-service training to make up for the possible deficiencies in professional knowledge (The teaching profession 2002).

STARTING A TEACHING CAREER

Regarding the start of teaching careers, one of the critical issues researchers deal with is whether new teachers find employment in the teaching profession. Due to current demographic trends, the number of students is on the decline, and fewer teachers are needed, so beginner teachers can mostly fill vacancies created by retirement or fluctuation (Chrappán & Bence 2020). Recent longitudinal research has shown that it depends on graduates' majors how soon they find a job, and that personal contacts also matter (Györgyi et al. 2014).

Once having secured a job, new teachers are faced with the critical phase of becoming a teacher. It is commonly believed that the test of professional aptitude is the time spent teaching rather than the time of training. There are two possible ways to prepare teachers for their actual work at the start of their careers. The first and more widespread one is to have a **period of teaching practice** (usually a year) in the final year of studies at university. The other way is to be **mentored** after employment by an experienced senior colleague who is qualified for this task. In English-speaking countries, starting a teaching career does not mean

a period of teaching practice mentored

final on-the-job
training

that one's studies are followed by one's entry to the labor market, but instead results in a combination of the two, a **final on-the-job training**. As transition to work is not without difficulties anywhere, there have also been aspirations in Hungary recently to make it smoother (Nagy 2004).

To most beginner teachers, starting a career involves frightening and stressful experiences, and a lot of exhaustion. This is even more so if they face a more challenging student composition compared to their practice period, encountering students with different backgrounds, attitudes, and knowledge. Overwhelmed by responsibility, they have little time left for planning and self-correction, and it is difficult for them to ask for help. There are only a few places (the Netherlands, Northern Ireland, and Scotland) where best practices have been developed to help with the critical transition period. Unfortunately, in most places there are no well-planned programs, and the connections between schools and higher education institutions are rather weak. In Coolahan's opinion, the presence of a mentor can be extremely helpful (Coolahan 2002).

beginning
teachers

In most countries, **beginning teachers** are not employed on a permanent contract but on a probation period, the length and conditions of which vary considerably. Probation can be a part of teacher training like in France, Luxembourg, and Scotland, but it can also follow teacher training and precede a permanent appointment like in Belgium, Spain, and often in Austria. The length of probation ranges from one (as in Malta, Spain, and Greece) to three years (as in Poland) (The teaching profession 2002).

Teachers are generally given fixed salaries. The amount can be equal for everybody (e.g., in the UK, Slovakia, and Finland), or it can depend on the individual's qualifications (e.g., in Hungary and Poland). We provide more detail on the effect of starting salaries in the section on remuneration.

STATUS

public servant

In Europe, the employment of teachers follows two basic patterns (and combinations thereof) occurring in nearly equal measure. One is the status of **public servant**, which means that employment is essentially independent of the status of the school e.g., in terms of remuneration. Teachers are employees of a state authority or a local government, with a status like other public servants working in different jobs. They can be employed on fixed-term or permanent contracts. This model, prevalent in the state schools of France, Malta, Luxembourg, and Belgium, is characterized by high job security and predictable (often linearly increasing) salaries. In Belgium, as well as the Netherlands and Ireland,

most students attend state-funded private (mostly denominational) schools. The status of teachers there, by mutual consent, is like that in private institutions. In countries where teachers are typically employed as public servants, the number of teachers in that status, whether they have fixed term or permanent employment, tends to diminish slowly but steadily. This tendency can be explained firstly by alternative forms of employment gaining ground, and, secondly, by the closed nature of the teaching profession due to the oversupply of teachers. The status of **public officials** resembles that of public servants, but it involves higher professional prestige and job security, in addition to a stronger sense of identity. This form of employment is present in Germany, Spain, Belgium, and Austria (affecting Hauptschule teachers). In the second model, teachers are **employees**, and their contracts are signed by either a local authority or the school itself. This form of employment is closer to the conditions of the labor market; employment is often preceded by negotiating salaries, working conditions, and workload. With respect to prestige and job security, the real divide is not between teachers who are public servants and employees, but between teachers who are public officials and those who are not (The teaching profession 2002).

status of public officials

employees

CHARACTERISTICS OF TEACHERS' WORK

Teaching is not a conventional nine-to-five job. In contrast to the generally held view that the advantages of a teaching career are flexible working hours, long holidays, and personal contact with students, teachers themselves often find their work strenuous and desire more predictable work. Evidently, the hours spent in the classroom are only one portion of teachers' working hours.

WORKLOAD

Teachers' working hours can be divided into three parts: (i) the time spent teaching in the classroom; (ii) non-teaching time spent at school (e.g., taking care of children or doing teamwork with other teachers); and (iii) the time spent on school-related work outside school (e.g., correction of students' work, preparation, self-development), the quantity of which varies across individuals and is difficult to define.

Working and teaching hours may also vary depending on what is included in them. Whereas in Romania the breaks between classes are included in a teacher's working hours, in Poland they are not, although,

number
of statutory
teaching hours

obviously, teachers also spend the breaks at the school (Education at a Glance 2019). The number of teaching hours required by law decreases with age. In Finland, Bulgaria, Romania, and Slovenia, the **number of statutory teaching hours** is lower for teachers of the mother tongue given that they must correct more written work. International surveys have revealed that, with a few exceptions, teachers' workload has not decreased significantly in recent years and neither has the growing workload been automatically compensated for by higher salaries.

One of the drivers of change in teachers' workload is diminishing financial resources. Although the increase in compulsory working and teaching hours makes the system more cost effective, it also has an adverse effect on teachers' working conditions. The Dutch example illustrates that a growing number of teaching hours led to reduced costs, but as the supply of teachers fell, the number of compulsory teaching hours had to be reduced to attract more teachers to return to the profession (The teaching profession 2002).

non-teaching
tasks

The regulation of teachers' **non-teaching tasks** varies across countries. School heads in most European states may expect their staff to do work outside of regular teaching, such as taking care of children outside the classroom, developing learning material, remedial teaching, preparing students for academic competitions, cooperating with fellow teachers, and supervising exams. While in German-speaking countries teachers do not receive any compensation for these activities, in other countries it varies whether teachers are given any extra payment and if they do, how much. Taking part in internal evaluation can be a compulsory task, but in Slovakia, for example, it does not count as working time. Non-teaching tasks may include students' continuous assessment (Denmark), teamwork (Denmark, Poland, and Lichtenstein), curriculum development (Finland), or compulsory in-service training (Malta, the Netherlands, and Austria). In some countries (Denmark, Spain, Luxembourg, and the UK), non-teaching tasks are strictly regulated. Defining the workload has gone hand in hand with increasing it almost everywhere (The teaching profession 2002).

NUMBER OF STUDENTS IN A CLASS

Class size

Other controversial measurements of teachers' workload are the student-teacher ratio and the average size of classes. **Class size** is one of the most popular fields of research. It has been studied in the United States since as early as the 1920s. On the one hand, research can focus on the absolute

size of classes and study groups, but, on the other hand, most large-sample surveys such as PISA express class size with the help of the **student-teacher ratio**. The question of class size reduction has sparked off fierce arguments among American academic policymakers. It is widely believed that the smaller the size of a class, the better students perform. In smaller classes, teachers' attention is less divided; consequently, they have more time to monitor each student's progress, which results in enhanced performance (Mitchell & Beach 1989). Smaller classes are more familiar, everybody has a chance to express themselves, and teachers can get to know their students more thoroughly (Santiago 2002). Class size reduction, however, is a highly costly way of improving the efficiency of education, as more teachers are needed, each of whom must be paid salaries, and smaller groups also fill more classrooms. Although it is usually impossible to work with optimal-size classes, it is worth defining the student number that facilitates sufficiently efficient teaching. The size of certain student groups, such as those with specific learning disabilities, are lower than the average class size. There are also some subjects (e.g., foreign languages) that are taught in smaller groups in order to enhance efficiency. These classes are usually distributed over a period of time so that multiple classrooms are not in use at once (Mitchell & Beach 1989).

student-teacher
ratio

Other researchers hold the view that **class size reduction** does not guarantee better achievement, because achievement primarily depends on the quality of education. Hanushek (2000) argues that there might be some special circumstances in which class size should be reduced, but altogether it does more harm than good. In his analysis of the STAR (Student/Teacher Achievement Ratio) survey,¹⁹ he points out that class size reduction alone does not encourage the use of innovative/better/alternative methods in the group and, moreover, as the number of teaching staff would increase in schools, so would the number of those teachers whose work is not up to standards. Additionally, since this is a very costly way of increasing efficiency, it would hardly produce any return. The findings of PISA 2009 revealed that class size did not correlate with achievement; smaller classes did not perform better (OECD 2010).

class size
reduction

In response to Hanushek's findings, Kruger (2000), also referring to STAR data, highlights that it is mainly disadvantaged students whose performance is enhanced by class size reduction. When calling for more spending per student, he emphasizes long-term effects.

¹⁹ Class sizes were reduced from 20 to 15, and students' test scores were examined to judge the efficiency of the program.

Quality indicators such as the length of the academic year, student–teacher ratio, and the amount of expenditure per student have hardly any visible effects on student performance. The debate on these issues is predominantly methodological. In general, researchers conduct regression analyses using aggregate data at the school level to detect the effects, but the procedures they apply differ greatly in granularity. Regarding such analyses, Eide and Showalter (1998) called attention to the inherent potential for error. They divided their sample of students into quantiles based on performance to examine the indicators separately among students who performed differently. They did not find any significant link between performance and student–teacher ratio, but they found that a longer academic year enhanced the performance of well-achieving students while it did not affect the performance of their weaker peers. At the same time, there was significant positive correlation between the amount of expenditure per student and performance among students in the lowest quantile.

the number
of students in
a class

In OECD-countries, the number of students in a class is between 15 and 35, the average being approximately 20 (see Figure 5). The exceptions are Japan and Korea, where the average class size is above 30. In recent decades, average class size has decreased steadily, mainly on account of demographic trends.

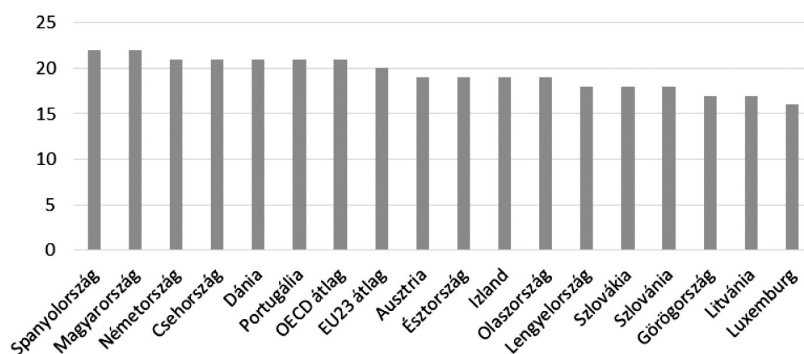


FIGURE 5: Average class size in primary and secondary education in OECD countries*

Source: *Education at a Glance 2019*.

* We do not have accurate data from nine countries.

PROFESSIONAL ADVANCEMENT

In several countries, teachers have lower incomes than other professionals, but in the best-performing education systems teachers' financial recognition is a top priority. Developed countries in which students have performed outstandingly in PISA tests (e.g., Korea and Hong Kong) spend considerably more on teachers. While public expenditure per student as a percentage of GDP does not affect performance, the spending on teachers' salaries has a positive effect. The teaching profession is attractive in all countries with high PISA scores, because both the prestige of teaching and salaries are high in such areas (OECD 2010). These two factors, which are usually interrelated, guarantee that a sufficient number of appropriately qualified and skilled teachers enter the profession. As we can see, remuneration does not have a direct effect on student performance, but it undoubtedly enhances the appeal of the profession and attracts talented workforce (Murnane & Olsen 1996; Jancsák 2014).

Teachers' **minimum salaries** are stipulated by law in every European country, and, as it has been mentioned, they do not depend on the circumstances (e.g., financial resources) of individual schools. The only exception is Italy, where teachers have been directly employed by schools since the decentralization of 1993, and their salaries vary across institutions. In general, teachers' salaries are adjusted to other public servants' remuneration, and they are compared to the country's GDP per capita by the OECD for reference. In most countries, the statutory minimum salary amounts to approximately as much as the GDP per capita, except for Germany, Greece, Spain, Portugal, the UK (England, Wales, and Northern Ireland), Cyprus, and Malta, where it is higher. Teachers generally receive a thirteenth and fourteenth salary, or an extra payment that approximates to the amount of a month's salary. Maximum salaries, which are the highest in the Mediterranean countries, are around 140% of the GDP per capita (Education at a Glance 2019).

The **seniority principle** has a strong presence in the teaching profession. The main factors influencing salaries are age and time spent teaching as opposed to aptitude or performance. Even though this is inherent in the profession, researchers find it a cause for concern. Nevertheless, there have been initiatives to use a performance-based pay scale everywhere to encourage teachers to work more efficiently and attain higher qualifications. The outcomes, however, vary widely. The system of individual salaries, which is essentially based on participation

minimum salaries

seniority principle

in in-service training, was introduced after 2000 in Poland and in 2010 in Slovakia.

pay scales

As teachers' salaries are calculated based on statutory pay scales, there is no competition in the market. Even in the US, it is only possible to compare various pay scales (Santiago 2002). Individual or performance-based remuneration is even less common in Europe. As such, utmost importance is attached to non-financial factors such as working conditions, which are obviously much worse in disadvantaged schools.

In the United States, although teachers in private schools usually earn less than their colleagues in state schools, research has shown that they are more content. It has also been found that private schools, despite lower salaries, are more likely to retain young and talented teachers, which is apparently due to a better mentoring system, more structured remuneration, and an easier procedure to dismiss poorly performing teachers (Ballou & Podgursky 1998). It has been confirmed by other researchers (Hanushek et al. 1999) that higher salaries entail more responsibility for outcomes. The question naturally arises as to how extra responsibility can be measured. The effects of remuneration can be examined accurately only if these non-financial factors are isolated from the work of teachers. The efficiency of teachers' work has been measured with teachers' attrition rates. After all teaching-related variables (e.g., the proportion of disadvantaged students) were examined through regression analyses, it was found that a 10% pay rise reduced teachers' attrition rate from 4% to 3% (Loeb & Page 2000). If the results of teachers' evaluation have an impact on teachers' remuneration, the system is called **performance-based remuneration**, which has three main forms: (i) merit pay, (ii) skill and knowledge-based pay, and (iii) a payment system based on student performance. All three models share a deficiency, namely that they do not reward work with disadvantaged students. The first two models are centered around the teacher, and the third one benefits teachers in elite schools.

performance-based remuneration

The first question posed by performance-based remuneration is how teachers' performance can be measured. The popular tools are class attendance records, student feedback questionnaires, and student performance indicators. However, the first two are subjective, influenced by sympathy as well as actual performance. As for student performance, it cannot be a valid measuring tool as students' demographics also have to be considered, as well as there being no tests registering students' development relative to their previous performance. Even if there were,

teachers would be encouraged to pay more attention to students with more development potential and neglect the ones falling behind. Transparency and standardization are important prerequisites for providing the best education for every student. Their downside, however, is that they can discourage teachers' creativity.

There are also different views on the influence of performance-based remuneration on personal relationships. As it may strengthen the connection between school leadership and teaching staff, it can be considered an advantage, but at the same time it also strains that relationship, not to mention inducing competition among colleagues, so the overall impact is likely to be negative. Furthermore, setting high standards for students overshadows the socializing function of schools by focusing exclusively on performance. Neither will measures encouraging cooperation among colleagues be effective without intrinsic motivation (Harvy & Beavis 2007).

SUMMARY

This chapter has provided an overview of the main stages of a teacher's career. Nearly every education system in Europe is struggling with the problem that although teachers must cope with increasingly difficult and complex tasks involving more and more responsibility, it is usually not the most dedicated and competent young people who choose this profession. There is a large body of research that supports this tendency (Murnane & Olsen 1990; Hanushek 2003). Research has also revealed that the reasons are complex and diverse, the most important ones being teachers' salary levels, working conditions, and the insufficient prestige of the profession, along with other macro- and micro-level factors.

In this chapter we looked at the policies implemented to attract the most talented young people into teacher training and gave brief descriptions of the different teacher training systems. We showed what is done in different countries to help new teachers with the initial difficulties in their careers and what can be done to prevent teacher attrition.

QUESTIONS AND TASKS

1. Give an overview of the factors that make a successful teacher training program.
2. Why is the initial period critical in a new teacher's career?
3. What does a teacher's workload consist of?

4. Why is the work of a teacher special?
5. List arguments for and against performance-based remuneration.

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THE CONTEXTS OF EDUCATION

Patterns of Time Use

Both study and recreation are time-consuming activities, and student populations show considerable variation in their time management. This chapter focuses on the factors that determine individuals' time use. We discuss how time management skills are acquired and what patterns of time use are typical for various ages, genders, social groups, and populations from different regions. Studying time use is important because it sheds light on why certain student groups find it very challenging to adjust to school time schedules.

Key concepts

Way of life: The system of activities performed to attend to needs. Through repetition, it creates a daily routine typical of certain societies or social groups. Way of life includes physiological, work-like, and casual activities.

Lifestyle: A concept narrower than way of life, containing activities of the individual's own choice. Whereas way of life is closely connected to sociocultural background, lifestyle is related to personality traits and habitus, but is also influenced by external conditions.

Time-budget surveys: A quantitative research technique of activities which allows the measurement of the average duration of activities and the proportion of the population engaging in the activities. They are based on two types of surveying: recall surveys and real-time surveys.

Leisure time: The component of way of life which makes up activities other than physiological and work-like activities. It has several positive features. Its patterns are different across various social groups. The amount of leisure time has grown over the last decades, but its subjective perception has not necessarily changed accordingly.

Culturism: A child-rearing trend that aims at passing down cultural capital at the earliest possible age in the largest possible amount. Evidently, it has an impact on children's time use. It is most characteristic of the middle classes and the intelligentsia.

WAY OF LIFE AND THE SYSTEM OF ACTIVITIES

WAY OF LIFE, LIFESTYLE, QUALITY OF LIFE, AND HABITUS

The most frequent terminology used in the research on way of life can also be interpreted in relation to time. **Way of life** reveals the duration of activities done to attend to needs (most often through time-budget surveys) and, using a similar approach, **lifestyle** focuses on optional activities which occupy a narrower section of individual time frames. Quality of life can be interpreted in the subjective dimension of experiencing time. Way of life is shaped by the conditions and characteristics of the environment, the system of habits and norms, cultural patterns, and individuals' personality structures. These factors result in entirely different patterns of way of life; however, macrostructural influences produce many similarities within a given social or cultural setting. The concept of way of life, which is associated with needs, has a certain degree of constraint, as the time available to humans cannot be extended. There is some room for play, and there are certain mechanisms (multitasking, techniques for freeing up time) at individuals' disposal, but a day can never be longer than 24 hours. This is where the economic and utilitarian concept of time can be traced back to: it is a finite resource, which must be used and managed wisely. Just like any other source of capital, time is also unevenly and unequally distributed.

LEISURE TIME

As way of life is formed, some elements which serve recreation become separated from work and providing subsistence. This is the sphere of **leisure time**, often described as an area free of constraints.²⁰ The phenomenon and concept of leisure time are the products of industrial societies. As the place of residence and the workplace became separated and work was completed within time limits, needs different from those of traditional societies emerged in people's lives. Leisure time can be regarded as escape from work, as a set of activities that make up for the deficiencies of working life, as a form of activity motivated by emotions, or to relieve the tension accumulated during work – even though some

²⁰ Research on way of life makes a distinction between unconstrained and constrained activities. The former are optional activities chosen by the individual, whereas the latter are done in order to attend to needs.

leisure activities are likely to generate tension themselves. However, no generalizations should be made, as the concept of leisure time is not defined accurately, and leisure activities show immense diversity. Over the last century, leisure time has clearly gained ground in the structure of activities, which is not only due to the decrease of time taken up by paid work compared to the age of the industrial revolution. In modern societies, phases of work and leisure time are separated more distinctly, to be mingled again in post-modern time management. It is worth highlighting the mediatization of free time, in which there is a clear-cut distinction between optional activities affected by various forms of mass media and the shrinking area of leisure unaffected by it (Ireland 2011). Nevertheless, it is to be noted that a controlled use of the internet is suitable for reducing the timeframe of working hours or services.

OPTIONAL ACTIVITIES OR CONSTRAINTS?

Leisure (free) time, unlike its name suggests, is not a field for purely optional activities, because it comprises a wide range of activities from fulfilling economic needs and meeting social or family commitments, to entertainment or cultural activities. Elias and Drunning (1986) categorize leisure into spare-time routines (attending to bodily needs, household routines), spare-time activities of self-fulfillment and self-expansion, and activities of entertainment (“mimetic leisure”). The classification suggests that only a small fraction of leisure activities stem from autonomous decisions and choice. Thus, the question arises whether all the positive effects associated with the consumption of leisure (relieving frustration, creation, etc.) can be associated with the entire domain of leisure time. The answer is most probably negative, since the benefits are usually experienced as a result of activities that are free of constraints and do not become routine.

Leisure (free) time

LEISURE TIME GAINING GROUND

The growth of the amount of leisure time, which is an undisputable trend of the past century, can cause problems in individuals’ lives for several reasons. The value systems that regulate time management strategies require the rational consumption of time. However, capitalism contradicts itself by prescribing Protestant work ethic and hedonistic consumption at the same time (Eriksen 2009). The weakening control of the community has given more freedom to individuals to decide on their leisure, but they have no ready-made scenarios for spending their free time, which

is available in ever-increasing amounts. This might result in one-sided recreational strategies.

TIME AND WAY OF LIFE

Riesman's (1967) categories of tradition-directed, inner-directed, and other-directed personalities can be characterized by different views on time, different types of activities, levels of autonomy, and value systems. The tradition-directed personality has a fixed structure of activities and little autonomy. Although people with inner-directed personality get rid of such external constraints, they prescribe an even stricter pace of life for themselves, which leaves almost no room for optional activities. Inner-directed people aspire to move upwards on the social scale, but their mobility leaves its mark on their range of activities and time use. Other-directed people plunge into leisure activities with as much energy as inner-directed people do into work. Other-directed people form their way of life and choose their activities to earn the recognition of their social environment, for example, by doing activities that count as **status symbols**. The way of life that emerges in such a way blurs the barrier between the spheres of work and leisure time. Tasks imposed from outside prevent identification with the activities and hinder the positive effects of leisure time. In Veblen's (2005) interpretation, leisure is the non-productive consumption of time, which is not equal to idleness or indolence.

status symbols

Non-productive
life

Non-productive life is void of the unworthiness of labor, though becoming familiar with and practicing the activities related to this way of life requires considerable time input from the non-working classes. It is only possible if these groups are exempt from the worries of earning a living. Engaging in activities that lack productivity counts as a status symbol and is inevitable in certain social groups. According to Veblen, non-productivity can be captured not only in the structure of activities but also in other elements of way of life and culture such as fashion, the ideal of female beauty, gender roles, or furnishings. These elements serve the separation of certain social strata and develop a strict, tightly controlled (Elias 1994) structure of activities, which does not allow for idling.

SOCIAL DIFFERENCES IN TIME USE

Way of life is one of the key factors that differentiates social groups from one another. The temporal characteristics of way of life are as important

distinctive features of a social class as its level of education and erudition, or its use of space (Fejős 2000). They can be captured in a different time structure and in the system, duration, and timing of activities. The phenomenon is not novel – it is enough to think of different patterns of time use in medieval or modern Europe (e.g., the times of meals, getting up, and going to bed). The differences increase with the differentiation of society and lead to significant diversity in concepts and use of time across social groups (Fejős 2000). **Different social times** had already emerged well before industrialization, and their coexistence continued throughout the following centuries in European societies (e.g., the distinct social time of the bourgeoisie, the aristocracy, and the working class).. In recent decades, sociological research has pointed out that a work-centered way of life and thinking (i.e., the dominance of the paradigm of work) enjoy a higher priority in the lower strata of society. It is evident that some leisure pursuits, such as extreme sports, attending classical concerts, or tourism, are linked to certain positions in the social hierarchy. Making this explicit can strengthen the status-related elements of identity and shows the direction of planned social mobility. By spending their leisure time in certain ways, certain “escaping consumers”, as described by Riesman (1967), can achieve a higher social status, or be confirmed in their positions in the upper ranks of society. Ways of escaping upwards include artistic activities (instrumental music, acting, or fine art), which evoke the upper-class way of life of past centuries. As for escaping downwards, some leisure activities may appear below one’s dignity. The need for escape can be prompted by an inner drive or expectations from the outside world.

Different social times

An important indicator of social status is the possession and the quality of cultural capital, the transmission of which consumes a great amount of time, not to mention financial resources. Therefore, these activities cannot be considered non-productive as investment in cultural capital yields its return in the long run. The existence of these long-term visions can be traced back to certain social strata’s perspectives on time: the sacrifices would make no sense in a present-centered way of thinking.

SOCIALIZATION INTO TIME MANAGEMENT

TIME IN FAMILY SOCIALIZATION

Learning time management takes place during **socialization**, and its full acquisition requires time. The process involves several agents

socialization

of socialization, primarily family and school, as well as the media²¹ and peer groups. It is not without any difficulty, as children often find it challenging enough to meet the expectations of only one of the agents, let alone cope with the often-contradictory demands of several of them. Learning time management requires both social and cognitive competencies from children, which are acquired through examples from their social environment and first-hand experiences (Matuschek 2005).

conflicts The first **conflicts** can be traced back to the close family environment in early childhood. The rhythm of family life can be seriously challenged externally by organizational time, which is regulated by the job market. By contrast, children like to attend to their needs at their own pace, while parents' activities are fixed in time and cannot be rescheduled. If parents' rational time management is well internalized, they might even expect their young children to behave accordingly. Conflicts may also stem from children doing an activity with too frequent intervals or doing it too slowly to adults' liking. Some parents expect their young children to be able to do things simultaneously, even if their capacity for coordinating simultaneous activities has not yet developed (Matuschek 2005).

INSTITUTIONAL SOCIALIZATION AND TIME MANAGEMENT

One of the distinctive features of the twentieth century is that a major part of individual time is structured by organizations and institutions, which means that work pace, the rhythm of life, and the sequence of actions are prescribed for us (Schilling 2005). However, this rarely takes a totalistic form (even though there have been such political aspirations and there are some prison-like organizations operating in this manner). For formal systems to work well, it is essential to align time use, which forces individuals into organizational time. Workplaces, offices, and schools all have their own organizational time, which requires a long period of learning and acculturation to be internalized.

**Organizational
time**

Organizational time can be regarded as an external constraint or time which is imposed on individuals to adjust their ways of life to and subordinate their personal activities to. Formal systems, such as Taylorian work management, generally demand a rigid time schedule,

²¹ Television can already impose a certain rhythm and fixed time frame in early childhood as weekdays and weekends alike can be given a regular structure by programs aired at a given time of the day or on a given day of the week (e.g. long cartoon shows on weekend mornings).

punctuality, rational time management, as well as high, and preferably constant, intensity. This is a source of multiple conflicts: there might be clashes of interest among members of an organization, or between the organization and its members. In addition, time management is a subject of constant negotiation.

If an individual's way of life is permanently governed by organizational time, the individual may internalize some of its elements. It is impossible to be integrated into an organization without the internalization of organizational time. Much of it is achieved throughout childhood, during the years spent in kindergarten and school, which are the key agents of the process. Creating the time use patterns of formal systems is certainly a question of power. Someone positioned high in the hierarchy has the right to structure their subordinates' time. In more democratic organizations, it is a collective task to structure the timeframe, and the guidelines laid down are not coercive. In this case, organizational time is perceived to be less alien.

Opposition to the organizational framework often becomes manifest in recurring, deliberate breaches of the rules of time use: lateness, unscheduled breaks, or procrastination. As it is in the organization's interest to enforce rules, pushing or crossing boundaries might be signs of protest or defiance in response to uniformization. It is especially true for institutions where entry is not voluntary (prisons, schools). Breaches result in sanctions, which might even be as severe as expulsion. Adaptation to organizational time is likely to generate serious conflicts as children and young people experience the time imposed by institutions as a real constraint. Children are trained to adjust to organizational time as early as in crèche and kindergarten, and later the rules and regulations of schools pose an even greater challenge, especially for young people from families without rational time management. In an organizational setting, children must either postpone or give up attending to their individual needs. All things considered, educational institutions play a key role in the internalization of **rational time management**, because these inevitable conflicts teach young children to adjust their own expectations to the time structure of the adult world and to put off fulfilling their own desires.

rational time management

TIME IN THE STAGE OF YOUTH

During the years of youth, both the need and the possibilities for creating one's own time grow. The rigid time schedule of institutions is perceived as a barrier, especially if attendance is not voluntary or young people's

need for creating one's own time

goals are incompatible with the opportunities offered by the institutions (see Willis 1981). The autonomy that young people enjoy in their free time and the fixed timeframe of organizations are in sharp contrast, and the latter is looked upon as an imposition and a constraint. If young people are unable to adapt, they will face sanctions, which is an expected reaction on the part of the organization as coordinated time use is key to its successful operation. At the same time, owing to the high number of curricular and extracurricular classes, young people have such tight time schedules that even adults would find it challenging to adapt to them (Matuschek 2005).

POSSIBILITIES OF MEASURING TIME

Time-budget
research

One of the recent trends in sociological time research is that it takes a more holistic and qualitative approach than it did before. The quantitative interpretation of time is giving way to perceptual and individualistic models. This approach is reflected in time-budget surveys, which include questions about daily routines and satisfaction with timeframes, to be analyzed in relation to the length of working time and leisure time (e.g., Williams 2002). **Time-budget research** focuses on the individual – it is not by chance that the emergence of this method coincides with the differentiation of society, modernization, and the disintegration of the traditionally determined, uniform way of life. This is a quantitative method, and its view of time is aligned to the absolute paradigm since it is measurable, convertible, comparable, and homogeneous. The data obtained through such means can certainly be analyzed at the macro level and reflect comprehensive social trends, while the basic unit of analysis is still the individual.

The quantitative research of time is not a novelty in social sciences: empirical research of time commenced quickly after the concept itself began to appear in sociological and anthropological theories. Time-budget surveys focus on the most tangible aspects of the relationship between people and time: the length, frequency, timing, and, occasionally, the social context of activities. The results are usually highly informative of the way of life in each society or social group and can be broken down by gender, level of education, marital status, place of residence, work status, family circumstances, etc. They are also suitable for longitudinal study. Compiling such surveys, however, is not without methodological stumbling blocks, and it is also very complicated to design international comparative surveys.

One of the most important milestones in the history of research on time use was undoubtedly the comparative study conducted in the 1970s by an international team of researchers led by Szalai. During the project, which involved 12 countries²², the methodology of time use research was also uniformized and refined. In each city or district chosen for the survey, the randomized sample consisted of at least 2000 people. Data was collected using two techniques; either recall or diary-based interviews. In recall interviews, respondents had to recall the events of the previous day; in diary-based interviews, respondents had to fill out a form serving as a diary of their daily activities, marking the primary or secondary nature of the activities, their locations, and social settings (real-time technique). Recall interviews were conducted if the respondent was illiterate, physically handicapped, or otherwise unwilling to fill out the diary form, and in addition, every tenth respondent of the diary-based interviews was selected for a recall interview as well (Szalai, Converse & Feldheim 1973).

Nowadays, several time-budget research techniques are in use with highly diverse data collection circumstances, validity, reliability, and results. For the best choice of method, researchers must consider the advantages and disadvantages of each technique – this is why it sometimes occurs that the selected procedure is the most questionable one from a methodological perspective. In one line of research, questionnaire respondents are asked to estimate the average duration of their activities (stylized estimate), mainly on a weekly basis. The other line of research, following in Szalai’s footsteps, base their studies on time use diaries (Kan & Pudney 2007). Both techniques have advantages and disadvantages: questionnaire surveys provide quick access to data and can be conducted on a large sample, but the figures obtained are only averages. Additionally, there is a higher likelihood of bias. The data obtained through **subjective perception** are mostly inaccurate and often reflect social expectations (e.g., highly educated parents tend to report their children reading more and watching TV less than it is realistic) (Kan & Pudney 2007).

subjective
perception

²² The survey was conducted in Bulgaria, Yugoslavia, Peru, France, the German Federal Republic, the German Democratic Republic, Hungary, the Soviet Union, Belgium, Poland, Czechoslovakia, and the United States. More than one location was involved in the German Federal Republic, Yugoslavia and the United States. The survey took place in medium-size industrialized cities with well-developed city centers.

TIME MANAGEMENT SURVEYS

Working hours Working hours are among the most interesting issues of the adult population's time budget. The length of the working week has decreased considerably during the past one and a half centuries, but the estimated pace and scope of the process vary from study to study. Trends in recent decades align with the changes described above. Time-budget research in Germany has revealed that the length of working hours mostly varies by sex and profession. It is also to be noted that the decrease of time spent working is not evenly distributed among different social groups. In 1997, 31% of managers and other employees with higher education degrees worked over 45 hours a week (Matuschek 2005). In 1998, the General Social Survey in Canada isolated a high-income and a low-income group from the sample: the former worked 46 hours per week on average, whereas the latter 40 hours (Williams 2002). As far as time spent on housework is concerned, researchers usually point out gender inequalities and the differentiating effect of educational attainment. The housework section in questionnaires usually includes preparing food, cleaning the house, and activities related to childcare, which usually increase women's workload. This is especially true for working mothers and those with multiple children. If the number of hours spent on paid work, housework, and other (secondary) work are summed, the results show that women work six hours more per week on average compared to their male counterparts (Matuschek 2005). Time management poses even more challenges for single mothers, leaving them in a very disadvantageous situation.

family time Time-budget surveys often have an extra category labelled **family time**, which includes the leisure time spent with children and the activities done with them. Klevmerken and Stafford (1999) state that the amount of family time started to rise in the 1970s, and the tendency was reinforced by the decrease in the number of children. In Eriksen's (2009) view, family time has recently become a category for the remnants of time, which can be filled or emptied to adults' liking, but the largest part of the time the family spends together is taken up by logistics. He finds that family time is being "Taylorized".

leisure time Research on **leisure time** unanimously maintains that, over recent decades, the amount of leisure time has risen in an unprecedented way compared to past centuries, reaching even 4 or 5 hours a day (Matuschek 2005). A Canadian survey has found a 40-minute difference in the amount of leisure time per day between groups on the two ends of the income

scale, with the poor extreme having more free time. The use of the time available, however, is more varied and active in higher-status groups. The reigning leisure activity is probably watching television, which takes up four and a half hours of an average American adult's day (Depp et al. 2010). These data raise the questions of well-being and happiness, since it is the group with the highest television consumption that scores the lowest on such tests.

QUESTIONS AND TASKS

1. Provide a brief summary of the time use patterns that are typical in the life stages of students and other young adults.
2. What patterns of time use are characteristic of child-rearing in highly educated families?
3. Why does the institutional time structure of schools pose a greater challenge to disadvantaged children?
4. Show the relationship between views on gender roles and the time spent on domestic work.

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Inequalities of the Spatial Environment

Spatial inequalities in society are natural phenomena since the diversity of natural resources and the resulting differences in economic structures are a natural source of spatial differentiation. However, they also entail social advantages and disadvantages, whereby certain students have significantly worse living conditions, educational possibilities, and employment opportunities than similarly situated peers living in a different region, simply because of where they live. Spatial disadvantages might even be considered an infringement of the exercise of civil rights (Enyedi 2009). In this chapter, we address the question as to how spatial inequalities are translated into **educational inequalities**. Students' family background has a significant impact on their school behavior and academic advancement. In addition to family background, children's academic performance is also determined by the characteristics of the wider residential environment in which they reside, through its impact on their lives. Teachers can therefore make their own work more effective by being aware of the characteristics of their local area, the background of their students' parents, the social composition of their schools, and the impact of these factors on children's achievement.

**Spatial
inequalities**

**educational
inequalities**

Key concepts

Ecology of education: A socio-ecological analysis of education examining the relationship between space and education, which has highlighted the spatial inequalities in education. A key research question on the ecology of education is whether the divergent development of regions modifies the effect of parental and school background on academic performance.

Periphery: Periphery can be the result of a remote location, e.g., near a border (situational periphery) or vulnerability (dependency periphery). We also distinguish between external and internal peripheries. The former refers to a declining region which is geographically distant from the center, while the latter refers to a region lagging in development.

Neighborhood and spatial autocorrelation: The principle of neighborhood is a force that binds and organizes regions and is based on the similar characteristics of neighboring regions. In contrast, spatial autocorrelation refers to the similarity of the neighboring regions.

The asymmetric effect of spatial characteristics: Hindering or supportive spatial environments have different effects, with disadvantaged areas having a greater impact on the social composition of schools than above-average environmental conditions. Unfavorable local characteristics have a stronger influence than favorable ones.

Polarization: The society of regions with unfavorable conditions is more polarized and features greater differences between families and schools. The underdevelopment of a region is associated with a polarized education system, as well as the institutional segregation of students from clearly different social backgrounds at higher levels of education. Development gaps act a force towards polarization.

SPACE AND THE SPATIAL APPROACH

spatial perception The **spatial perception** of social geography has evolved considerably since geographical determinism, which proclaimed the omnipotence of the physical environment, through the view of the environment as secondary to society and culture (Paul Vidal de la Blache), to the development of the contextual theory by Edward Soja. The importance of the latter theory lies in the fact that it does not consider spatiality as a factor external to the social context, instead seeing it as a structure created by society. Space is both an arena in which social life unfolds and a medium through which social life is created and reproduced. This approach is reflected in the social theory of regional studies as represented by József Nemes Nagy, János Rechnitzer, and Georges Benko, all of whom examine spatial processes and phenomena. They developed categories to explain the mutually reinforcing effects of inequalities. These include the concepts of center and periphery, the different types of peripheries, the principle of neighborhood, whereby areas with similar characteristics are organized into a larger region, and the principle of spatial autocorrelation, which is based on the similarity of neighboring regions. These concepts can be used to interpret the problems of the interconnection of inequalities and the coexistence of advantages and disadvantages.

ECOLOGY OF EDUCATION

The analysis of education from a **socio-ecological approach** has entered the field of sociology of education by examining the link between space and education and by drawing attention to spatial inequalities. The socio-ecological approach to education places emphasis on the environment in which social life takes place. Research from this perspective identifies the social environment with the place of residence, both narrow and broad, because its socio-geographical features, socio-economic conditions, infrastructure, institutions, schools, and historical and cultural traditions are as decisive for individuals as their origin, socio-cultural background, labor market situation, or social position (Forray & Kozma 1986a). The distinctive feature of socio-ecological research lies in the interpretation of spatial development in the context of individual and institutional behavior.

socio-ecological
approach

In Hungary, research from the 1970s onwards concerning spatial differences in the education system and admission processes shows that academic performance, career choices, and decisions to enter higher levels of education are significantly influenced not only by family characteristics, but also by the social and economic conditions in one's place of residence (Forray & Kozma 2013).

CENTER AND PERIPHERY

The concept of center is associated with certain social functions (e.g., transport hub; provides opportunities for employment, health, culture; has a secondary school network) which support its leading role. The traditional geographical approach links the emergence of periphery to a remote location (e.g., near a border). This is situational periphery. However, periphery also relates to the set of vulnerable elements in the system of social relationships. This is another **type of periphery** known as dependency periphery (Nemes Nagy 2006).

type of periphery

External peripheries are areas which are geographically distant from the center, are most often located near a border, and have seen almost universal decline in recent decades. Only the Western part of Hungary has been able to converge rapidly due to the expansion of direct economic links across borders. This region is now part of the dynamic Budapest–Vienna axis. The situation is quite different in other border regions. They generally lack urban areas and have high unemployment, while the population is poor, there are not enough resources, and it is difficult to

attract capital to them (see the eastern and northeastern border regions). In the South Transdanubia border region, there are also several marginalized settlements with rapidly declining population, which also lack the means to cooperate across borders.

It is not geographical distance from the center but rather the lack of development that is the main factor in the evolution of internal peripheries. They are often located on county or regional borders close to centers (Nemes Nagy 2006). The Central Great Plain, the Danube-Tisza basin, and several small areas in the Transdanubia region can be regarded as internal peripheries. The growth of these regions is hindered by the difficulties of economic renewal, poor transport links, insufficient services in their urban centers, and the lack of external resources. Geographical peripherality often contributes to a position of social periphery, with the result that the peripheral group is also spatially separated from the center. These mechanisms of exclusion lead to isolation (ghettoization, enclaves) and even segregation. As a result, the disadvantages in different social fields are clustered to form geographically well-defined areas.

THE PRINCIPLE OF NEIGHBORHOOD

Neighborhood plays a key role in the construction of different types of space. Its purpose is to create a greater degree of connectedness between the different elements of space. The **spatialization** of certain areas is initiated in this way. It also plays a role in the evolution of segregation or ghettoized villages.

Research in the sociology of education from a regional perspective (Benke et al. 2018) has concluded that a significant proportion of the underdeveloped and deprived sub-regions of Hungary are situated in a cluster, meaning that “areas with a similar socio-economic situation are located in their immediate vicinity”. This entails the danger that the people in these areas can only help their situation by moving away, with the result that these “local societies lose their most ambitious and talented members, and the process of decline becomes irreversible or at least difficult to halt” (Forray & Híves 2003: 76).

THE PRINCIPLE OF SPATIAL AUTOCORRELATION

The concept of spatial autocorrelation is related to the principle of neighborhood (Nemes Nagy 1996; Dusek 2004). It measures the relationship between indicators of adjacent spatial units. It is used to

show the **similarity of neighboring regions** in certain characteristics (e.g., taxable income per capita, employment rate, unemployment rate). The value of the spatial autocorrelation coefficient reveals how similar the neighboring spatial units are. The absence of spatial autocorrelation is a very rare exception; it is much more common to observe its presence.

similarity of regions

Spatial autocorrelation provides an answer to the question as to whether the spatial distribution of the examined phenomena reveals any regularity or can be considered random. It can provide an explanation for the coincidence (correlation) of certain phenomena, such as the development of a certain region and the education, health, and labor market position of the population living there, including young people's emigration patterns and decisions to pursue higher education.

UNITS OF ANALYSIS IN THE ECOLOGY OF EDUCATION

Micro-regions (LAU ¹²³) allow deeper spatial analyses than those at the settlement or county level. Analyses at the settlement level are difficult to understand, while those at the county level are not sufficiently nuanced. Education researchers use data at the micro-regional level to analyze parental and school background, as well as academic performance and higher education trends. In drawing up the boundaries of micro-regions, the Hungarian Central Statistical Office (KSH) sought to create territorial units in which the historical, cultural, social, natural, economic, and ethnographic characteristics of the included settlements are reflected and even homogeneous. The predecessors of the micro-regions were administrative districts. In 1998, in order to collect statistical data on micro-regions, the KSH developed a system of indicators to classify each micro-region into a development category. Five development categories were distinguished. (1) Dynamically developing regions, where most indicators are more than 10% above the national average excluding Budapest. (2) Developing regions, where most indicators are slightly above the national average excluding Budapest. (3) Converging regions, where most indicators are close to the average and show signs of growth. (4) Stagnating regions, where most indicators fall behind the national average by about 10%. Finally, (5) underdeveloped regions, where most indicators are below the average by more than 10% (KSH 2000). Since 2008, additional economic, infrastructural, societal, social, and

Micro-regions

²³ Following the Nomenclature of Territorial Units for Statistics used in Hungary. It was previously termed NUTS 4.

employment indicators have been taken into account (Faluvégi 2008; KSH 2008). The number of micro-regions has varied between 150 and 174. In 2011, districts became the basic unit of territorial analysis again, and were designed in a similar way to micro-regions. No settlement in a district is more than 30 km apart from the district center, which enables a return journey to the center in one day.

DEVELOPMENTAL DISPARITIES

The basic unit for territorial analysis is the micro-region. The development of micro-regions is summarized by a homogeneity indicator²⁴ that can show both the differences in development between micro-regions and their homogeneity in terms of favorable or unfavorable characteristics. The micro-regional characteristics used for the homogeneity indicator include the nature of the settlements, economic structure, economic development (GDP), education, demography, social conditions, infrastructure, employment, unemployment, and income generation capacity. This indicator can illustrate the position of each region on the development continuum and is also suitable for illustrating transitions.

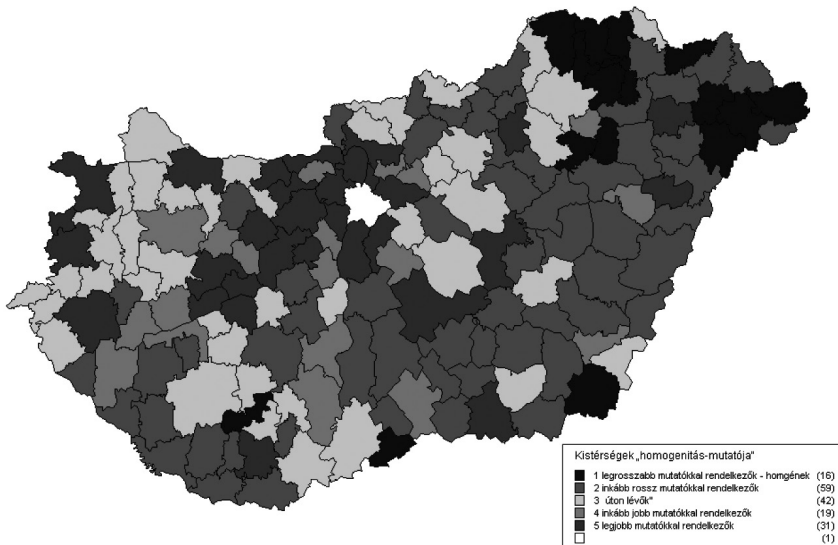


FIGURE 6. Homogeneity indicator for micro-regions

²⁴ Created by the author.

The map shows that, at the end of the first decade of the 21st century, less than a tenth of the micro-regions were classified as unfavorable in all aspects (9%), while over a third of them were classified as largely unfavorable (35%), i.e., over two fifths of the micro-regions were in an unfavorable position. Only 29% of micro-regions were in a favorable position (18% highly developed and 11% developed). Micro-regions usually **accumulate** either **advantages or disadvantages**. In line with the results of previous regional research, the most disadvantaged areas are mostly located in the northern, north-eastern, and eastern parts of the country, forming a coherent cluster in the counties of Borsod-Abaúj-Zemplén, Szabolcs-Szatmár-Bereg, Hajdú-Bihar, Jász-Nagykun-Szolnok, and Békés. Another cluster can be found in the southern part of Transdanubia, mainly in Baranya and Somogy counties. These regions include significantly underdeveloped (but formerly important) industrial hubs, areas with significant Roma populations, and economically declining (former) agricultural areas. The most advantaged areas are located around the capital and in Fejér, Komárom-Esztergom, Veszprém, Győr-Moson-Sopron, and Vas counties. Developing areas form a coherent cluster in the north-west of the country, namely in Győr-Moson-Sopron and Vas counties. A significant **polarization** of territorial disparities has also been observed: the share of disadvantaged micro-regions rose in the first decade of the 21st century, while previously advantaged regions continued to increase their existing advantages.

accumulate
advantages or
disadvantages

polarization

INEQUALITIES IN THE ECOLOGY OF EDUCATION

The real problem is not the existence of spatial disparities but the accumulation of advantages and disadvantages in a certain region. This is a problem because the more disadvantages are accumulated, the fewer opportunities the region possesses to tackle them. A comparison of unequal spatial development with data on the ecology of education (such as parental background, social composition of the school, competency test results, and spatial characteristics of higher education) results in the **accumulation of inequalities**.

accumulation
of inequalities

The education system must address highly significant spatial differences in family background. To characterize parental background, the calculations rely on the so-called index of home educational resources, which captures family characteristics that are decisive for students' academic career. Its components include the parents' educational attainment, the number of books owned by the family and the student at

parental
backgrounds

home, and the availability of information technology tools for learning (at least one computer). Researchers use the index of home educational resources to aggregate data at the school and micro-regional level (Horn et al. 2006; National Assessment of Basic Competencies 2008; Garami 2013; Hegedus & Sebestyen 2019). The distribution of the index enables researchers to distinguish between micro-regions with average, above-average, and below-average **parental backgrounds**. The typology presented below is based on data from 2008 (Garami 2013), but spatial characteristics change gradually and can influence the academic and labor market careers of the population in these areas over a long period of time.

Families with an average parental background are characterized by parents with below upper secondary education. These families have computers and typically have few books in the home. One third of children receive regular social aid. An above-average proportion of such families live in the central and southern parts of Hungary, including Central Transdanubia. Favorable parental background is characterized by parents with upper secondary and tertiary educational attainment, who possess a relatively large number of books and several computers. Such families are overrepresented around the capital and in Central, Northern, and Western Transdanubia. Unfavorable parental background refers to parents with the lowest educational attainment, who own no computers and few books. These families display the worst indicators of financial situation. Most students receive regular social aid. An above-average proportion of these families live in the counties of Szabolcs-Szatmár-Bereg, Hajdú-Bihar, and Jász-Nagykun-Szolnok.

REGIONAL DIFFERENCES IN THE SOCIAL COMPOSITION OF SCHOOLS

social composition
of schools

The **social composition of schools** is at least as important for children's school performance as parental background (Lannert 2006, Széll 2013). The social composition of schools and spatial differences present are closely related to spatial differences in family background. To characterize the composition of students, researchers have constructed an index of student proportions with respect to several factors, which they then average at the school level. The indicators used to calculate the index are the proportion of children who (i) live in above average or very poor financial circumstances, (ii) receive regular social aid, (iii) are provided free textbooks, (iv) are at risk, (v) receive free or discounted meals at school, and (vi) have parents with a tertiary degree or are unemployed. The

distribution of the index can be used to classify schools into clusters with average, above-average, or below-average social composition (Garami 2013). The average social composition of a school essentially means that many children's families face existential problems, are in need of help, live in poor financial circumstances, and, in many cases, are affected by unemployment. Such schools are mainly located in the north and east of the country and in the peripheral areas of Somogy and Baranya counties. Schools with a favorable social composition have a higher proportion of children with above-average circumstances and graduate parents, and a significantly lower proportion of children who receive regular social aid and have unemployed parents. Such schools are mainly located around the capital and in the northernmost and western parts of the Transdanubia region. Schools with an unfavorable social composition have a very high proportion of students who receive regular social aid, are entitled to free or discounted school meals, and have unemployed parents. Such schools form a large cluster in the north-east of the country.

FAMILY AND SCHOOL BACKGROUND IN LIGHT OF REGIONAL DEVELOPMENT

There is a significant correlation between the homogeneity indicator of a region, the parental background of primary school children, and the social composition of the schools there. Most children come from an unfavorable parental and school background in two-thirds of the disadvantaged regions and from a favorable background in half of the advantaged regions. Education in the less advantaged regions is more polarized, with greater differences among families and schools.

In one third of the regions, the observed parental and school background does not correspond to what is expected based on the level of development in the region. Where social circumstances and the labor market situation are better, and the population is more highly educated, both the parental and school background could be favorable despite regional disadvantages. However, in regions where, despite relatively favorable conditions, children's parental background and the social composition of the schools are lagging, the discrepancy is the result of the low educational attainment of the population.

The effect of spatial characteristics is asymmetric and sometimes adverse, and the effect of a supportive environment varies. The disadvantaged situation of a region can have a greater impact on the social composition of schools than above-average regional circumstances.

The effect of spatial characteristics is asymmetric

Unfavorable micro-regional characteristics have a stronger effect than favorable ones. A significant proportion of converging and developing micro-regions are located in the Western and Central Transdanubia region.

SPATIAL DIFFERENCES IN STUDENT PERFORMANCE

National
Assessment
of Basic
Competencies

There are several ways to measure the efficiency of education, but the results of the **National Assessment of Basic Competencies** and secondary education admission data are particularly useful for statistical analysis. Since 2001, annual national assessments have conducted to assess the reading and mathematics competencies of students in grades 6, 8, and 10. Data is collected on institutions, students, and their parents. The assessment measures the extent to which students can apply the knowledge they have acquired at school to solve everyday problems. Data of 8th graders also provide substantial information on further progression in the system. The Admission Information System of Secondary Institutions (KIFIR) has been in operation since 2000 to support and record the applications and admissions of around 100,000 children each year. Secondary school applications are also understood as an outcome, which is analyzed in relation to the retention rate of the regions (for the secondary school age group), the supply of and demand for institutions, as well as the success and selection indicators of the secondary school admission process.

school
performance

The relationship between **school performance**, parental background, and the social composition of the school has been discussed in previous chapters. Not surprisingly, there is also a strong correlation between students' performance in national assessments, their parental background, and the social composition of their school. However, a key research question in the ecology of education is whether the different levels of development across regions modify the impact of parental and school background on achievement. In the majority of underdeveloped regions, the adverse spatial effect is stronger than the effect of family background, while the influence of the social composition of schools is strong. In overperforming regions, the influence of parental background on school achievement remains. In regions where most conditions are favorable, there is a higher likelihood of good performance despite unfavorable family and/or school background. However, where circumstances are mostly unfavorable, it is more likely that even students from relatively favorable family and/or school backgrounds could underperform.

In relation to **secondary school applications**, both the available schools and the retention capacity of a certain region depends on its overall development (Garami 2003, 2013). Our results show that, on average, around half of young people continued their secondary education in a region different from the one where they had started primary school. Regions with the best conditions and the best selection of institutions had the highest proportion of students who stayed. Underdeveloped regions have a much lower **retention rate** and tend to display above-average rates of outward migration among young people. A low level of development is associated with educational opportunities which provide little perspective (vocational schools). As conditions in a region improve, the proportion of students who attend secondary grammar school (with specializations, minority cultural focus, bilingual training, or language preparation) increases.

secondary school applications

retention rate

In the most disadvantaged areas, young people are most likely to be enrolled in two **types of institutions**: 6- or 8-year secondary grammar schools and vocational schools. Relatively more advantaged students in the most disadvantaged areas enroll in 6- and 8-year secondary grammar schools, some of which are run by churches. The 6- or 8-year secondary grammar schools are more selective in terms of academic results, but enroll students in less favorable areas than in more developed areas.

types of institutions

The function of vocational education is demonstrably different in advantaged and disadvantaged areas. In developed regions, vocational training is based on the needs of a properly functioning economy, whereas in disadvantaged regions it is designed to keep the most disadvantaged and deprived young people in school.

THE IMPACT OF SPATIAL CHARACTERISTICS ON EDUCATION

In this chapter we have shown that spatial characteristics have a significant impact on the efficiency of education and on decisions to pursue further education, mainly through their direct impact on the existential situation and living conditions of families, the conditions under which schools operate, and the social composition of educational institutions. Additionally, spatial characteristics have an indirect impact through the infrastructural, economic, and demographic conditions in the region. The effect that a disadvantaged social environment with several problems has on the social composition of schools can be greater than the **impact of an accommodating environment**, thus reinforcing its

impact of environment

unfavorable features. The effect of a hindering environment is therefore stronger than that of a supportive environment. This in turn can lead to an accumulation of disadvantages in each region, to such an extent that any development efforts at the regional level may be seriously set back. The less developed a region, the more polarized its education tends to be. Thus, underdevelopment leads to polarization.

QUESTIONS AND TASKS

1. Describe the main characteristics of the spatial approach.
2. Describe the principles that determine how regions are organized.
3. What socio-ecological characteristics can be used to identify differences between regions? What is the homogeneity indicator?
4. What regional differences are observed in parental background and school composition?
5. How do regional differences affect the efficiency of education?

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The Transmission of Values in a Pluralistic Society

Generations growing up in pluralistic societies encounter a diversity of value systems, but during their upbringing they get a clear picture of what their parents and educators find valuable in life and in child-rearing. This chapter introduces readers to the concepts of values and value preferences, as well as their transmission and acquisition. The transmission of values by schools and problems concerning the study of value preferences are also discussed.

Key concepts

Values: The section of culture which shows what is considered good and important by a community. Values influence our activities, determine our goals to be achieved, and the means to be used, in addition to shaping our choices. International comparative studies on values juxtapose data from different countries, but value preferences also vary across social groups.

Acquisition of values: The section of socialization which is related to the transmission of values. While its main scene is the family, formal and informal agents also have a role to play. Values transmitted by different agents of socialization do not necessarily coincide.

Child-rearing values: Values related to the purpose and desired outcome of child-rearing, which influence parents' practices. There is a distinction between means values and end values. Not only parents' but also teachers' educational values can be examined.

Collectivism: The group of value preferences which gives priority to collective values. In collectivist groups, individuals' identities are based on belonging to a community, it is of utmost importance to adhere to commonly accepted norms, and child-rearing values are oriented towards integration into the community.

Individualism: The group of value preferences which emphasizes the importance of the individual. The rise of individualism is closely related to modernization – however, some scholars argue that it was the change in values that induced modernization. Individualistic value preferences put individuals' happiness and self-fulfillment before the survival of the community.

DEFINING THE CONCEPT OF VALUES

VALUES IN SOCIAL SCIENCES

values Despite theoretical and measurement difficulties, **values** stand out as points of convergence in the system of social sciences and can be defined as key concepts of various branches of humanities (Váriné, 1987). The main research questions, summarized by Hitlin and Piliavin (2004) in three points (what is meant by the concept of values, where they originate, and how they work), are essential for every discipline within the humanities. However, the logic of each discipline requires a different approach. Moreover, disciplines do not agree about the extent to which values can be regarded as abstract concepts (Evans 2007) and whether they can be interpreted and researched as subjective or objective entities (Orthmayr 2008). Prior to the 1960s, the concept of values appeared only sporadically in humanities, but the last few decades have seen an unprecedented upswing in value research, which is mainly due to new ways of operationalization and international comparative research on values.

subjective
objective Philosophy differentiates between a **subjective** and **objective** approach to values. Whereas the former denies the objective existence of values and the fact that they play a role in the “edifice” of the world, the latter approach, which has developed in the wake of rationalist philosophy, presumes that values can be regarded as facts and form an organic part of the structure of the world (Orthmayr 2008). For the most part, sociology, social psychology, and anthropology utilize the objective approach. The discussion of values is inevitable for the study of education because values can be captured in the communities which shape individuals. The views of man in social sciences, which presuppose that humans are embedded in communities and universal laws govern individual behavior, construct an intermediate space between individuals and their actions.

The concept of values in theories which emphasize behavioral imperatives can be derived from the characteristics of the macro community (Kluckhohn & Strodtbeck 1961). The societal nature of values is reinforced by the fact that this concept condenses the experiences and world views of a long series of generations. Values include proven methods to achieve certain ends as well as selected and productive patterns of behavior. The **embeddedness of values in macro communities** facilitate their objective interpretation. At the core of the concept of values is the mechanism of evaluation itself. The choice between good and bad

embeddedness
of values in macro
communities

is related to the concept of quality and counts as a primary category in the world of values (Bugán 1994). Evaluation selects from goals as well as ways to achieve them, which is how individual actions become suitable for judgement.

THE TRANSMISSION OF VALUES AND ITS RELEVANCE TO SOCIALIZATION

One of the most interesting fields of value research is the study of **child-rearing values**. Research that aim at mapping those values deal with rules of what is considered ideal behavior in a community (politeness, respect), factors related to sustenance (hard work), life paths assigned to children, and the qualities needed to achieve them (leadership, confidence) (Füstös 1986). Educational values fostered by parents, teachers, and teachers in training can also be subjects of study.

child-rearing
values

The acquisition of values requires the same mechanisms as the acquisition of the elements of behavior and thinking. Identification and imitation are of utmost importance, which mainly take place in the family during the early years of life. External reinforcement will also become significant later. This is an active process, during which cognitive efforts are made to acquire values. Individuals judge and select from the impressions they receive. It is to be noted that selecting reference groups also involves value choices.

In Schwartz's (1992) theory, the acquisition of values contains both active and passive elements as, in his view, we interiorize the prevailing group norms along with our personal experiences. Zavallioni (cited by Váriné Szilágyi 1987), an acknowledged representative of modern value research, maintains that values are not constructed through passive reception and imitation, especially after early childhood. He also points out that the patterns being passed down are not permanent but change constantly.

SOCIALIZATION AND THE ACQUISITION OF VALUES

As individuals acquire cultural codes during socialization, the scenes of culture acquisition are at the same time the scenes of learning about values. The transmission and acquisition of values takes place simultaneously at all scenes of socialization, in formal educational institutions, workplaces, and peer groups alike. However, the value systems being transmitted do not necessarily coincide. The acquisition

of values is a process which can be viewed as a series of judgements formed by children's most immediate contacts such as the family, school, or other scenes of education. Value systems within families tend to converge as the differences between parents are most often small (Bugán 1994).

learning process

The **learning process** is by no means exempt from slumps: becoming acquainted with and processing judgements result in "value uncertainty", which can be regarded as a natural concomitant of value acquisition. The formal operational stage, as named by Piaget, plays a key role in this process (Bugán 1994). It is inevitable that certain values assume a central position as a person's identity takes shape and matures. When studying the transmission of values within the family, one must be aware that the entire process of child-rearing, the elements of which constitute a complete system, is influenced by the family's sociocultural background. Value preferences are only one element in the system. What all the elements have in common is convergence: values, child-rearing principles and practices form a coherent system (Tudge et al. 2000). Even if it does not produce a clearly determined result, the process itself is to be treated as a tangible one. A line of recent family research focuses on exactly this problem, and is related to what is known as the transmission hypothesis, which holds that status has an effect on value preferences, child-rearing values and practices, and presumes that the systems thus formed are passed down to the following generations in a relatively intact form (Yi et al. 2004; Aavik et al. 2006).

THE CHANNELS OF VALUE TRANSMISSION

Since there is no specific channel for transmitting values, it is largely different from transmitting rational knowledge, which is done through academic life and the education system. Váriné (1987), however, argues that in **institutions**, there exist some overt or covert channels where the transmission of values is possible. The growing influence of **peer groups** starts to play a key role at the beginning of youth, which is when negative identification also develops: while young people are constructing their own value systems, the point of reference is what they do not want to resemble. Thinking over Mannheim's (1970) generation theory or visualizing Mead's configurative society (where learning takes place inside cohorts and not between generations), we must take into consideration that, if circumstances allow, it is young age groups that typically create their own norms and values. As a result, generation gaps will be deeper. It is evident that when approaching adolescence, individuals have increasingly more

institutions
peer groups

opportunities to get familiar with values which are different from those of their families, and the different values might even clash. In order to avoid confrontation, initiates to a new scene of socialization will sooner or later adapt to its value system (Koivula 2008).

Over the past two decades, leaving the parental home and setting out on a real adult life have shifted to a later age among young people in Hungary. This either postpones the time of the first encounter with different value systems or reduces the likelihood of the encounter. This state of half-independence in young adulthood will most probably result in subdued material thinking. New scenes of socialization still exert their influence, and adaptive mechanisms continue to work in adulthood even though the drive to belong to a group and to identify with it are already weaker due to the nature of this life stage. However, identification with the values of an environment which are different from one's own (e.g., in a changed political context) can lead to the "adjustment" of value systems. Even in adulthood, one's life course can produce situations in which changing (for better or worse) prospects or goals might restructure the system of values. Basaran (1992) links changes in value preferences to education, different institutions, and changes in the technological environment. Altogether, the acquisition of values spans the entire socialization process, but the likelihood of change is rather low in adulthood.

VALUES AND SCHOOL

Educational institutions also play a key role in the transmission of values. The climate to which students adapt originates in the intersection of teachers', students', and organizations' value systems, which are often different from the value preferences students bring from home. If we do not take a normative and absolutist approach to values, the idea of "good" and "bad" values can be dismissed, and the equivalence of individual value items or motivational bases can be accepted. It is only in specific cultural contexts or individual perceptions that negative or positive judgements are attached to them. In this light, the value orientations of institutions – although they show diversity – cannot be ranked. The education system plays a key role in transmitting the culture and values of a society. In order to fulfill one of its major tasks, namely to maintain the integrity of society, it needs individuals who have a similar way of thinking or, at least, who adhere to similar rules. Different strata of society have different structures of thinking; however, even with different foundations, the aim is to generate shifts towards similar

**Educational
institutions**

directions. Institutions clearly do not have full autonomy to choose the values to be passed down, since the choice is shaped by several factors such as education policy. Additionally, knowing the impact institutions have on personality development, we must realize that advocating certain values in **manifest** ways does not guarantee their acquisition and internalization. That said, we do not imply any **latent** content but the fact that the actual mechanisms of socialization taking place in institutions and the objectives set by the organizations do not always converge. Much of the socialization process is out of educators' sight and control. As it is known, educational institutions are much more complex entities than what could be described with the system of educational goals and tools. The value systems of schools are very diverse, being shaped by factors such as the pedagogical models adopted by them. The elements of the models, for example motivation and discipline techniques, content elements and the quality of student-teacher relationships can all be classified into various value models.

FAULT LINES IN VALUES

GEOGRAPHICAL LIMITS: LOCAL FRAMEWORKS AND GLOBALIZATION

national identity One of the important functions of **national identity** is to give a sense of belonging, meaning that identification and disidentification take place simultaneously within the "self" (Csepeli 1991). Another function is to structure the world: relationships between groups gain meaning through associations even if the objectivity of the results is questionable. Like other segments of political socialization, national and ethnic identity develops and takes root in early childhood, forming a deep and hardly mutable layer in a person's identity. Eriksen (2002), who has conducted research mainly in Northern Europe and developing countries, interprets the emphasis on ethnic identity as a political tool rather than a response to any threat from outside. Public education plays an important part in forming and fixing identities, as it is evident that individuals never establish personal connections with most categorized groups. Consequently, national identities turn out to be constructible. The interiorization and functions of national stereotypes evoke the concept of **closed mindedness**, as framed by Kruglanski (2005), which enables quick decisions, hinders empathy, and develops accepting attitudes towards the upper end of the hierarchy and rejective ones towards the lower end. The author claims that closed

mindedness could be intertwined with ethnocentrism and dogmatism, as well as possibly inducing intolerance towards minorities. The extensive use of national discourse, which was brought about by romanticism and the birth of nationalism, is a relatively new phenomenon.

Globalization, often defined as the world arranged in networks, can have (and does have) two effects on national sentiment: on the one hand, it can encourage a shift towards broader networks; on the other hand, as a reverse effect, it can lead to renewed attachment to local values and their deeper incorporation into people's identities. Ester, Mohlen, and Vinken (2006) note that it is still uncertain whether globalization will lead to the convergence or the divergence of values, regardless of the fact that the Davos culture is charged with special value content and that national cultural frameworks and codes, which have appeared to be stable so far, now seem to be falling apart due to migration. In the authors' view, global changes are bringing to values such as self-reflection and anthropocentrism to the forefront. Kendall, Woodward, and Skrbis (2009) analyze cosmopolitan existence and its impact on value systems. Individuals leading a cosmopolitan lifestyle connect to their social classes at a global rather than national level, and bear signs of the erosion of ingroup mentality. The guiding values of cosmopolitanism are rationality and efficiency, which go together with openness to adopting elements of other cultures. The authors link the foundations of cosmopolitanism to the capitalist economy. The above guiding values do indeed belong to modernism, albeit completed by tolerance and openness.

Globalization

As a reverse effect, globalization can also result in the growing significance of **localities**. This can be because the global economy and culture hardly give individuals any guidance to define their positions, as they neither have an outlook on broader contexts nor can access global clues. However, one must be aware that questions of national identity became excessively politicized during the 20th century. People's attitudes to them are determined by several other factors as well.

localities

COLLECTIVISM AND INDIVIDUALISM

In the comparison of societies, the collectivism-individualism axis serves as an essential tool which provides perhaps the best perspective to observe differences in social behavior. Most researchers presume a linear shift on the scale indicating societies' movement towards individualistic values during modernization. Others, however, detect wavelike patterns in societal trends. Reykowski and Smolenska (2003) observed such

fluctuation in Poland after the democratic transition, while Heller (1992) hypothesized that modernization is analogous to a pendulum swinging back and forth between collectivism and individualism. Cerulo (2002) emphasizes that the shift towards individualism is not necessarily definitive, and every community shows different patterns. Moreover, several theories hold that the two notions are not to be viewed as the two opposite ends of a scale; in other words, they do not exclude each other. Additionally, these two phenomena can be traced back to different origins: whereas individualism is rooted in Anglo-Saxon and Flemish culture, collectivist behavior is the most typical in “Eastern” areas. In social sciences, research on collectivism, individualism, and shifts between the two goes back to as early as the end of the 18th century, when the first analyses in the subject were published (Csukonyi 2008), and to the 19th century, when authors such as Tocqueville (1990 [1835]) or Tönnies (2001 [1887]) based their work on these concepts. In the Western world, there has been an upswing in research since the mid-20th century (Cerulo 2002), focusing on phenomena like social networks, suburban isolation, or the disintegration of traditional community life.

Collectivism

Collectivism takes a strongly communal approach to humans. In collectivist societies, priority is given to views, needs, and goals that do not belong to individuals themselves but to the groups they are members of. However, this does not involve any conflict as personal and ingroup goals – conceived of as obligations – converge (Triandis 2018). It is to be underscored that individuals do not choose the group they belong to but are born there and owe it loyalty. The emphatic elements of identity are grounded in community membership (Hofstede 2005). Csukonyi (2008) adds that, in such societies, ingroups and outgroups show substantial differences (ingroups are seen to be more unified), and open confrontation as well as conflicts of interests are avoided. The values cherished by society are also present in child-rearing principles: obedience, respect, politeness, and a sense of obligation all play an important part in socialization (Csukonyi 2008; Hofstede 2005). The smooth cooperation of societies, which is related to conformity, is also a priority.

individualism

The birth of **individualism** goes hand-in-hand with modernization. Individuals’ ideal typical final state is experienced in modern societies. The triggering mechanisms, however, are not known. Triandis (2018) specifies two main conditions of individualism, namely economic independence (i.e., individuals are self-sufficient without any help from a community) and cultural complexity. The latter puts an end to the absolute dominance of ingroup features by introducing people to new

worldviews, problem solving methods, and alternative lifestyles, which are available to them due to their economic independence. This tendency is reinforced by ethnic and occupational diversity, which are also major trends in modernization. Macfarlane (1978), on the other hand, reverses the above reasoning by saying that, as early as the 13th century, the English way of thinking contained elements that could serve as a foundation of subsequent social and economic changes such as the central role of money, rational thinking, increased mobility, the disintegration of multigenerational families, distrust within social networks, and the primary role of individuals in ownership. The main features of individualism are the nuclear family, a sense of self, and the practice of judging people by their characteristics (Hofstede 2005). Most people's social behavior is governed by personal goals (even if those contradict collective goals), desire for self-fulfillment, as well as independence and self-confidence. Individualistic people are good at establishing new relationships if they come to a new environment (Csukonyi 2008).

MEASUREMENT AND FINDINGS

POSSIBILITIES OF MEASURING VALUES

The concept of values and questions of their measurement have long occupied social scientists. Szilágyi (1987) differentiated between four research trends in the early years: the branch linked to the schools of cultural anthropology and personality psychology (including anthropological studies of educational principles and behavior), the elaboration of abstract analytical schemes (e.g., Parson's value theory in 1937), intercultural studies (e.g., Kluckhohn and Strodtbeck's [1961] work), and social psychological experiments. In addition to this, a large body of research in those decades, for example Mannheim's theory of generations (1970), were not specifically focused on values but, nevertheless, their conclusions made a considerable contribution to the approach and results of value research. The first milestone was the theoretically based, 45-item value test compiled by Allport and Vernon, first published in 1931. Allport, Vernon, and Lindzey (1960) describe values as motives and evaluative behavior, and distinguish six main value types: theoretical, economic, aesthetic, social, political, and religious. Kluckhohn's works, characterized by the traits of functional anthropology, were published from the 1940s, serving as significant reference points in the following decades.

Rokeach's Rokeach's (1973) name is related to not only one of the most widely used definitions of values but also the clarification of the concept's boundaries: he was the first to make a distinction between attitudes and values. Attitudes are more varied and more difficult to capture, as well as being less predictive of behavior. Values are less numerous (Rokeach's value test contains only 36 items) and indicate permanent beliefs related to lifestyle and the ultimate state of existence. At the same time, they transcend specific situations.

Schwartz's Recent decades have seen a remarkable surge in value research, predominantly due to Schwartz's theory and the empirical research based on it. Schwartz (1992) highlights five formal characteristics of values. He defines values as concepts or beliefs which refer to desired final states of existence or desired forms of behavior, transcend specific situations, guide behavior or the selection and assessment of events, and can be ordered by their relative importance. Schwartz first established eight types of motivation, adding another two types later. Each motivation type is an umbrella term spanning several values. They were generated from 57 items (Schwartz Value Survey), and later an association-based method was also developed (Portrait Value Questionnaire).

QUESTIONS AND TASKS

1. What are child-rearing values about and how do they reflect parents' child-rearing goals?
2. How and through which channels of socialization are values transmitted?
3. What are the main individualistic and collectivist values?
4. What factors can transmit values at schools?

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The Impact of Teachers on Student Achievement

The first part of this chapter gives insight into research findings on the impact of teachers' work on student achievement, which is very difficult to detect with scientific methods. The second part presents the various ways in which teachers can influence student achievement, both directly and indirectly.

Key concepts

Professional development for teachers: Formal training aimed specifically for teachers. Research has shown that long-term training programs in methodology implemented jointly by the teaching staff of a school among their own students are more efficient than short lecture courses in an academic subject.

Environmental effects: Student achievement cannot be interpreted at the individual level. Individual student achievement in a school is influenced by the peers' average background and achievement through norms, expectations, obligations, and the flow of information, as context-level cultural capital.

Sources of teachers' intragenerational capital: Activities teachers engage in as a team outside the classroom, either in or out of school, such as joint preparation for teaching, or other forms of collaboration. Only a handful of studies have called attention to the fact that teaching is not an individual but a collective achievement, and classroom activities cannot be separated from the school context.

Value added: An indicator that measures student achievement by isolating teachers' contributions from factors outside teachers' control that are known to strongly affect student performance, including the family's cultural capital, advantages or disadvantages arising from the place of residence, and performance in previous schools.

Value-added modeling (VAM): The contribution of the school is not assessed merely on the basis of predicted values, but also by tracking individual students' development through longitudinal data. It adds the dimension of time, so it can be applied only if assessment is regularly repeated.

THE EFFECT OF SCHOOLS

Teachers Matter – this is the title of an OECD report and a related set of policy recommendations which aim to attract talented and competent teachers to the profession. Those who are unfamiliar with the research of the past fifty years on school performance may not see the significance of such a title. For decades, the primacy of students’ social background as the key determinant of school achievement was not challenged by any other measurable factor. In other words, students whose parents had a high level of education performed well, and the school itself did not make a big difference. By now, as statistical methods have become more granular, it has grown evident that schools and teachers do matter, which also corresponds to what we experience on the daily. But what is a “good teacher” like? Which indicators determine the quality of a teacher’s work? What does “good teaching” mean? Is it possible to measure and record it? Several underlying factors shape the process during which education policy decisions reach their goals through changes in student performance. The most important factors are perhaps the **policy and practice** of teachers, both of which become manifest in teaching.

Teachers Matter

policy and practice

The first question this chapter addresses is whether the effect of teachers’ work on student achievement can be captured. Although the correlation between the two was difficult to prove for decades, our instant answer would be a definite yes. However, prevailing practice dictates that principals prefer to select among students rather than oversee teachers’ work. Generally, what makes a school successful and highly popular is top admission lists and the success students have in academic competitions. If schools admit high-ability students from favorable backgrounds, they will easily excel, even if the quality of teaching is not very high. Research has confirmed that student achievement largely depends on **parental background**.

parental background

It was Coleman in the 1960s (Coleman et al. 1966) who first conducted research on the effect of the school environment on learning outcomes. However, his initial studies either did not find any link between school characteristics and student achievement or found it insignificant compared to students’ origins and other factors. Raudenbush and Byrk (1992) also note that, in the early phase of research, it was sociological features that came into focus and classroom work was ignored). If it is true that outcomes are primarily determined by family background, then educational policymakers, schools, and teachers remain powerless to promote the fulfilment of students’ individual potential. There are several

Coleman

clear-cut and measurable features emerging during the teaching process, while other causes and effects remain unnoticed.

TEACHERS' HUMAN CAPITAL AND STUDENT ACHIEVEMENT

human capital The indicators of teachers' **human capital**, or individual resources, are easily discernible and therefore widely researched. What makes research more complicated is that researchers tend to treat all indicators together. Economists and education researchers usually regard teachers' qualifications or test results as the basis of teacher quality, therefore examining the variables related to them (e.g., their relationship with remuneration).

One of the most popular research areas concerns teachers' qualifications or, more precisely, the system of their qualifications. As it is known, a teacher's career does not only consist of teaching, but they also study, take further degrees, and participate in numerous professional development programs. Accordingly, this section focuses on how a teacher's performance is affected by obtaining qualifications, the level of qualifications, and the nature of professional development.

THE EFFECT OF TEACHERS' QUALIFICATIONS

qualifications Teachers' **qualifications** are a major issue in education policy. The primary question is whether a teacher has a degree in the subject they are teaching. Although, owing to population decline, there is an oversupply of teachers in Europe but some subject areas in certain regions still lack qualified teachers. For instance, it is typical of teachers of vocational subjects not to have had any teacher training, or, in subjects like physics or IT, teachers' expertise can be easily utilized elsewhere in the labor market. Many researchers have established correlation between teachers' qualifications in specific subjects and student achievement. Darling-Hammond (1999, 2000), for example, found a slightly positive correlation between student achievement in mathematics, science, and reading comprehension and teachers' performance and qualifications. A study on mathematical performance conducted in Texas, after controlling for several teacher (professional experience) and student (origins, family background) characteristics, found that the possession of a certification by the teacher had a strong positive effect on student performance (Celeste & Fuller 2004). However, the impact of teachers was not as strong as that

of some variables related to origin and individual behavior. Students, mostly from disadvantaged backgrounds, who were at risk of attrition, performed much worse than their peers. Monk (1994) also found a positive relationship between teachers' qualifications and student achievement.

Another important question is **the level of teachers' qualifications** (bachelor's, master's, university or college degree). Presumably, teachers with higher qualifications teach better. This hypothesis was corroborated by Wenglinsky (2000), who found that students whose teachers had majored or minored in their subjects at university outperformed their peers. In their longitudinal study between 1980 and 1982 (High School and Beyond), Ehrenberg and Brewer (1994) pointed out that students whose teachers had graduated from selective, high-prestige institutions scored higher on achievement tests.

the level of
qualifications

THE EFFECT OF PROFESSIONAL DEVELOPMENT

Teaching as a profession requires constant learning and development, which is strongly determined by the individual's learning environment (Zoller 2015). Recently, professional development has received increasing attention at both the national and international level. However, there is still insufficient data available about its efficiency. Research has shown that the diversity of the acquired and applied methodology makes it easier for teachers to select and adapt the most efficient practices in their student groups (Scheerens et al. 2007). It is long-lasting **professional development** programs that are considered most efficient. Short-term programs are not monitored as extensively due to time constraints and a smaller budget not allowing thorough control and impact studies. In the United States, the work of some mathematics teachers was followed by researchers, who found that teachers who used a wide variety of practices in an adequate way enhanced their students' achievement on tests (Cohen & Hill 1997). Earlier research also revealed that, when given the opportunity to receive professional development and become familiar with new methods, teachers' work demonstrated a favorable effect on students' test scores (Wiley & Yoon 1995). Wenglinsky (2000) studied the relationship between students' achievement in mathematics and science and certain teacher characteristics. He found that students whose teachers had received professional development in methodology performed 40% better than their peers. Angrist and Lavy (2001) tested the efficiency of a professional development program for teachers, developed in the United States, in a sample of schools in Jerusalem. They collected

professional
development

data on the schools and the achievement of their students, both before and after the professional development, to compare the results with data from other schools that had not taken part in the program. The outcomes were inconclusive, as only a few schools put into practice what the program offered to them. It was found that the performance of denominational schools was not affected by the program, which was attributed to the fact that these schools joined at a later phase and did not enroll so many teachers. In non-denominational schools, on the other hand, professional development improved performance to a greater extent compared to what class size reduction or a slight increase in the number of classes would have resulted in. Nevertheless, as the study was carried out in different sectors of education, it cannot be firmly established – nor does the study provide an answer – whether the differences were due to the factors mentioned above.

training in
methodology

hands-on
learning

continuous
assessment

Wenglinsky (2000) linked students' test scores on standardized tests (National Assessment of Educational Progress) to the methodology used by their teachers. He concluded that teachers whose students did better used other practices than their colleagues. He highlighted the importance of professional development, as many teachers in his sample received **training in methodology** related to students with special needs. He found that this type of training gave teachers the best preparation for efficient work. The practices he considered most beneficial were laboratory work in science subjects and **hands-on** (experience-based) learning in mathematics. Students whose teachers used these methods outperformed their peers by about 70% of a grade level in mathematics and by 40% in science subjects. In addition, **continuous assessment** was also found very helpful. In Wenglinsky's study, students who frequently took point-in-time tests outperformed those who did not by 92% of a grade level in science. He found that in the United States, multiple-choice tests were gaining so much popularity that they might soon replace portfolio assessment (the use of which is limited to higher education in Hungary), which monitors students' development through essays. A study of instructional practices, which examined the teaching environment (e.g., class size), as well as teachers' practices and attitudes to their work, found that, while a smaller class size could enhance efficiency, more time spent on preparation by the teacher was more beneficial to students. Importantly, as also confirmed by further research, student achievement is not directly linked to expenditure on education, the diversity of curricula, and well-equipped facilities. Another longitudinal study of teachers, initiated by educational policymakers in the United States, concluded that teachers who taught

children from disadvantaged social backgrounds were more likely to use recommended teaching practices than their colleagues who did not teach low-income students or students with limited English proficiency (Henke et al. 1999; Cohen et al. 2000).

**A COMPLEX MEASUREMENT METHOD:
VALUE ADDED BY TEACHERS AND VALUE EXPECTED
FROM STUDENTS**

It was Hanushek (1992) in the early 1990s who gave the most complete description of the results of efficient teaching. His primary goal was not to examine teachers' performance, but to find out about the effect of advantageous or disadvantageous family circumstances on academic achievement. He proved both that birth order in the family influenced achievement, and that this effect could be compensated by the school. He measured the quality of teachers' work with value added, which is the average amount of student achievement growth attributable to a certain teacher during an academic year. His findings confirm that students who have good teachers can gain as much as half a year's advantage over those whose teachers perform around average, whereas students with substandard teachers may have to struggle with half a year's disadvantage. In other words, the quality of teaching can account for a full year's "difference in knowledge."

It is still to be clarified how much of a students' performance is due to their own abilities and to the school, and how the influence of teachers and peers compare within the latter. It is especially important from the perspective of policymakers to develop a measuring tool to assess work at school and find the best practices. Presently, the tool that gives the most information about schools' and teachers' performance is the value-added index. It has been developed based on the model of **Economic Value Added (EVA)**, which stands for residual income (profit), or, in other words, the difference of the return and the invested capital. For schools, the aim was to develop an indicator which is capable of measuring student achievement in a way that it isolates variables (e.g., family cultural capital, advantages or disadvantages arising from the place of residence, or achievement in a previous school) that have a strong effect on performance.

Economic Value Added

Since the second half of the 1990s, various indicators used in **value-added modeling (VAM)** have frequently appeared in the English-language literature. Calculations not only involve the estimation of the value added by the school based on the expected value, but through longitudinal data,

value-added modeling

school climate

the development of individual students can also be tracked. McCaffrey et al. (2003) attempted to develop the most accurate measurement so far to demonstrate the effect of teaching on student achievement. Changes in a student's achievement at school can be measured with relative ease. Evidently, the effects of family background, the place of residence, and other background factors must be separated beforehand. But how can the effect of teachers (individually and collectively) and of other school factors (e.g., leadership of the school, school district policies, or peer groups) be separated? The authors applied the most granular statistical techniques possible to eliminate errors, but since these various effects work inseparably in real life, making up the school climate, they were hardly separable during the analysis, either. McCaffrey et al. (2003) captured teacher influence at the class or group level by isolating students from similar backgrounds and calculating how much above or below average they achieved in each teacher's course. Models used by the sociology, and especially the economics, of education do not take into consideration individual motivation, ambition, diligence, and capacities, but regard them as qualities fostered by the school.

THE POWER OF COMMUNITY, OR SOURCES OF SOCIAL CAPITAL AND ACHIEVEMENT

Some researchers have found an empirical relationship between teachers' individual professional and qualificational characteristics and student outcomes, but several studies are inconclusive or show no correlation. To substantiate their results, researchers almost always produce regression tables with data on teachers' salaries, the level of their qualifications, and their professional development. However, these measurable factors have hardly any explanatory value. In summarizing several decades worth of research, Wayne and Youngs (2003) conclude that it would be a grave mistake on the part of policymakers to evaluate teachers' work only by relying on aspects of human capital like professional experience and qualifications, ignoring other features of teaching (Wayne & Yungs 2003). They raise two possibilities, namely that either teachers' characteristics have little effect on student achievement, that is, "teachers do not matter", or the indicators of human capital listed above are incapable of identifying good teachers given that unmeasurable factors also play an important role in teaching. Certain factors are difficult to measure, and there are usually no indicators that are unanimously accepted by all researchers (Santiago 2002).

Most studies focus on the system of interpersonal relationships and infer that students' achievement is shaped by the quality of their relationship with their teachers and of their parents' relationship with the school. All these factors are termed **sources of social capital** and are studied within social capital research. What makes things difficult is that teachers cannot give their human capital directly to their students. In our view, human capital can be transmitted through different elements of social capital (Leana 2006, 2010; Hargreaves & Fullan 2012), such as good rapport between teachers and students as a source of intergenerational capital, professional collaboration among teachers, which creates a community based on shared pedagogical values, as well as the social network around the school.

sources of social capital

In the following section, we examine the factors that researchers have introduced to complete the explanations of human capital. Although they are difficult to capture empirically, there have been attempts at their measurement, and there exist some softer scales for that purpose, which are more or less accepted. The following notions are used in both school climate research and social capital research, since both work with structural features such as the student-teacher ratio, the quality of personal relationships, as well as shared values and norms. Although scholars of the two areas do research independently, we attempt marry the two fields because we believe they are essentially identical. We call attention to the similarity of theories and findings so that our readers can see that the literature addresses two aspects of the same phenomenon.

Factors that are beyond teachers' human capital, but still affecting student achievement, can be classified into two types of capital sources. First, we have a look at intergenerational relationships, i.e., the effects of relationships between students and teachers, which is the more widely researched of the two. After that, based on the findings of research on intragenerational factors, we analyze the dynamics within the teaching staff of schools: teachers' relationships with principals and the relationships between colleagues.

INTERGENERATIONAL SOURCES OF CAPITAL

To organize classroom work efficiently, teachers need flexibility, creativity, task-oriented behavior, and a tolerant and open attitude towards students. Darling-Hammond (1999) defines good teachers as being able to apply their professional knowledge in such a way that works most efficiently in their classes and with their students as individuals. To achieve this

purpose, teachers must know their students and classes thoroughly and be familiar with various pedagogical alternatives, which are to be acquired through training and practice. Efficiency is (or may be) related to the diversity of the methods applied and to the features of classroom practices, but these two factors can neither be separated clearly nor be linked with each other linearly. For a long time, researchers who worked with quantitative methods and large samples neglected to record what was happening in classes and failed to pay attention to classroom practices. Nevertheless, these are important intergenerational sources of capital: teaching is realized as an **interpersonal relationship**, and it does matter how teachers get on with students, what their communication skills are like, how well they can convey information, how enthusiastically they teach, and how committed they are.

interpersonal
relationship

Regarding student–teacher relationships, the question of environmental effects arises. Student outcomes cannot be interpreted separately at the level of the individual. The average background and achievement of students in a school, as cultural capital, influence individual achievement through norms, expectations, obligations, and the flow of information (Coleman 1988).

school
socialization

During **school socialization**, the cultural backgrounds and academic attitudes of student communities (entire classes or small cliques) and of individual students interacts with each other and can amplify or cancel out one another. Regression analysis has made it clear that that school-level indicators (average indices) also affect individual achievement (Fényes & Pusztai 2004; Fényes 2008). This is **the effect of school context**. School effects such as the composition of the teaching staff, the leadership of the school, and school climate all influence student achievement and can cause deviation from the “expected value”. On the other hand, deviation can also be traced back to the aggregate of students’ socioeconomic backgrounds, which is a factor that cannot be influenced easily, so the deviation in this case cannot be explained by pedagogical practices. High-status and well-achieving students consolidate their teachers’ status.

the effect
of school context

Several studies emphasize the importance of emotions in school life, which is based on social relationships and communication. Brookover (1978) has found that student outcomes are much more closely associated with students’ perceptions of their efforts being successful or futile than with their ethnic identities and socioeconomic backgrounds.

organizational
climate

How can these effects be grasped? Nash (1983) was the first researcher to claim that **organizational climate** has a strong and direct impact on

achievement. Research findings have since confirmed the view that school climate and morale contribute to the performance of the staff. In schools where the atmosphere and the style of communication are positive, academic results are better and attrition rates lower, which shows that social and human capital is utilized better. The number of studies on school climate and its effects have increased recently, with a growing amount of evidence from diverse samples supporting the validity of the hypothesis.

INTRAGENERATIONAL SOURCES OF CAPITAL

Intragenerational sources of capital include work-related activities teachers are involved in outside the classroom, both in and out of school, such as preparation for teaching and collaboration with colleagues. Only a few studies express the view that teaching is not an individual but a collective achievement and that classroom practices cannot be examined in isolation. This point is usually made by studies that focus on the performance of entire schools. Among teachers' attributes, it is the significance of collaboration that is most often highlighted. Goddard and Goddard (2007) examined fourth graders' performance in mathematics and reading tests and found that scores were higher in schools where there was close collaboration among teachers.

There are several studies on the effect of school leadership, but the findings are often contradictory. We focus on school leadership and present some results in this chapter since they are directly related to teachers' work. Teachers' questionnaire responses reveal that the role of the principal manifests itself through the teaching staff, so our empirical investigation addresses teachers' perception of principals rather than principals themselves.

The study of the link between **school leadership** and student outcomes has a long tradition in Britain and the United States. European (mostly Dutch) research, using such easily measurable variables as principals' gender, age, and qualifications, either found no correlation between school leadership and student achievement, or the correlation was negative. The differences between European and overseas findings can be explained by the fact that in English-speaking countries principals have a managerial role with a real, direct impact on school life, whereas in Europe they are first among equals, one of the teaching staff, and therefore have a smaller impact, which only becomes manifest indirectly, through other teachers (Széll 2013). However, more granular techniques (regression) of recent

school leadership

research have also established a positive relationship in Europe (Gift & Houtveen 1999).

leadership
practices

In the analysis of **leadership practices**, researchers only adhere to a few general guidelines since schools, along with their students, teachers, providers, their environment, etc., are so diverse that a certain leadership practice cannot be deemed successful or unsuccessful, because it might work in one community and fail in another (Horn 2006). In their review of the literature, Leithwood et al. (2004) present several statements about the correlation between school leadership and student achievement. In contrast to previous studies, they attach very high importance to the effect of school leadership. Their findings show that leadership is second only to classroom instruction regarding student outcomes.

There is a long cause and effect chain between the quality of school leadership and students' performance. Most studies do not elaborate on how this effect, which undoubtedly has statistical evidence, manifests itself. Now our focus is on the effect of school leadership and teachers. Leithwood uses the image of "four paths" to model how leadership can influence student achievement (Leithwood et al. 2004). He constructs a rational, an emotional, an organizational, and a family path, which altogether account for 43% of student outcomes. His model also includes academic pressure, discipline, trust (towards parents and colleagues), the creation of a professional community, and relationships with families. The first three paths also rely on teachers' contribution. School leadership has a dual task: it is not enough for them to set appropriate goals and choose the right practices, but they also must involve teachers as partners to realize them. The goals set by the principal – such as keeping discipline, which is a prerequisite for good achievement, and attaining good academic results – are conveyed to students by their teachers. With the help of the path model, it is possible to measure how powerfully these goals are conveyed.

SUMMARY

In this chapter, we have attempted to define the characteristics of good and efficient teachers. We have given an overview of research on teacher quality, partly from a historical and partly from a disciplinary perspective. We have found that there are an almost infinite number of school and teacher characteristics discussed in the studies. In the early phases of research, these attributes were interpreted in isolation, and later they were linked to various indicators of student achievement.

First, we have looked at teachers' sources of human capital. Teachers' qualifications are among the most widely researched aspects of teacher quality, mainly because they can be measured well and easily. The crucial point is whether a teacher has a degree in the subject they teach. Most studies have demonstrated that teachers' qualifications have a significant impact on student achievement, and even the level of qualification matters, although it has a less powerful effect than some other variables, which are mainly related to students' family backgrounds.

After taking their first degree, teachers continue their training. The impact of professional development on teacher efficiency is gaining popularity as an area of research; however, results have been inconclusive so far. The majority of studies focus on long-term professional development courses on the methodology of teaching and succeed in proving their usefulness. However, we must allow for publication bias, i.e., the fact that papers generally present research findings that provide evidence for the necessity and usefulness of professional development.

The starting point of this chapter has been that the sources of human capital can only be utilized if they are accompanied by social capital: a positive social environment based on trust and shared values. Therefore, we believe research on social capital and school climate have common features. In one section of our discussion, we have explored the two main sources of social capital: intergenerational sources based on the student–teacher relationship and intragenerational sources that emerge in teacher–teacher relationships.

Intergenerational sources of capital usually exist in student–teacher relationships, especially in communication. The frequency and depth of communication are crucial, and so is the fact that it must be grounded in mutual acceptance. At the same time, a shared value system is also important in student–teacher relationships. If a school's social climate is based on these principles, it will remain stable even if the composition of its population (especially of students) changes constantly.

Teacher–teacher relationships is a research area that has not received much attention so far, although it has appeared in school performance research, which has analyzed schools as units, and therefore teachers have also been treated as a body. Of interpersonal relationships, it is the relationship between principals and teachers that is most often discussed. A recent line of research, which has been undertaken in the Nordic countries and the United States, addresses teachers' collaboration and learning communities. However, its findings have not yet been widely analyzed in relation to student performance.

QUESTIONS AND TASKS

1. List the factors external to the school setting that can influence a student's academic performance.
2. Give a brief list of the school-related factors that can influence a student's academic performance.
3. Choose a teacher characteristic that can influence a student's academic performance and demonstrate the relationship between the two in detail.
4. What is the essence of Value-Added Modeling?
5. What sources of capital influence teachers' performance?

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