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Obsah

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Financing of tertiary education: the Czech Republic and Europe *

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Introduction

Currently, the system of tertiary education funding is highly discussed. A number of countries in the European Union accessed or consider accession to the change in funding from the state to the family kind. The same situation is also in the Czech Republic. In European Union countries there appear two major trends of tertiary education funding: some states have reduced state contributions (e.g. in the UK it is possible to talk about rather the USA system), while others use a completely opposite trend. Given that the tertiary education is through Bologna process closely linked, those steps have impact on other countries.

Tertiary education is not always encouraged to achieve excellence and the same problem faces efficient employability of graduates, which does not always correspond to changes in the market environment.

The aim of this article is to describe the systems and trends of tertiary education funding in the Czech Republic and neighbouring countries, briefly introduce the concepts and their impact, and then discuss or recommend the possibility of their use and application in the Czech Republic.

A state's economic performance increasingly depends not on the access to new technologies and adoption of new requirements, but economic performance depends mainly on the labour market and knowledge and skills of labour force. The differences in living standards between countries are assigned according to the International Labour Office specialists especially to the disparities between the levels of training and the quality of employment. Thus countries with high levels of education are serious competitors for the others, by increasing their ability to adapt better to new technologies and challenges generated by globalization.

1 Theoretical background

The European Union is committed by the Lisbon Treaty to support education and development (Vostrá et al., 2011). Key indicators of the Lisbon strategy are concerned just on education, increasing the number of graduates of tertiary education, sustainability of employment and mobility of employees. Priority for Europe as a knowledge-based society till the year 2020 is above all productivity, education, employment in its influence on the development of society (Vostrá et al, 2011). As reported by Novotný, Mikulecký (2011), working with people and their knowledge is a critical success factor. Currently, however, some fields have trouble in finding employees mainly due to lower interest of young people in these fields (Švarcová et al., 2011).

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Education is an important factor supporting the labour market, by improving adaptability to change of graduates, allowing the individual to take more chances in the labour market integration and in the continuity of the life. Additionally, skilled and educated people are a long term investment of the society, becoming the support of growth and economic development, education and lifelong learning by offering the chance to successfully face the competition in the labour market. Education is essential for any economy, because educated individual has the ability to contribute as a member of the society and to bring new knowledge, social capital, and innovation and thus support the economy. Moreover, the current economy needs well-trained workforce, in terms of globalization and technological revolution, which requires the development of skills, creativity, solid knowledge and a greater sense of responsibility.

The growing demand for higher education, which is presented as a guarantee of later career (and the associated economic) success, along with its modernization and increasing dynamics, which increases the attractiveness of higher education caused in the Czech Republic „sharp increase in the number of students," which, however, "was not matched by a corresponding increase in expenditure, so there was the fastest decline in spending per student across the OECD" (Matějů et al., 2009, p. 42).

Studies show that a higher level of education enables the individual a better labour market insertion, increases the chance to adapt to the labour market demands and it positively influences the quality of life and reduces the default risk of unemployment. Education plays a central role in preparing individuals to enter on the labour market and in lifelong learning experiences. Investiments in education develop human capital and thus the economic development and growth (Giarini, Malita 2005; Krueger, Lindahl 2000; Spence, 2009).

The surge in students is also caused by the ongoing crisis since 2009. This crisis is no longer seen as a short-term and students artificially prolong their stay in the school until labour market conditions improve and hope in higher qualifications and the opportunity to participate in a growing economy.

This trend has three main causes (Oxford Analytica, 2012):

- Thanks to the crisis escalated competition for human resources and increased demands on the minimum education and skills to successfully find a suitable job,
- Opportunity costs (the amount of income during the study period) are decreasing because the wages and salaries are decreasing,
- Students believe in overcoming the crisis period at the university without being hit by recession.

At present, there is a massification of tertiary education (this concept was named back in the 70s) (Trow, 2006). Trow (2006) argues that the increasing number of students in tertiary education affects all other aspects of the content and forms of teaching methods and forms of study up to the quality standards. Given the interdependence of these aspects, the three development phases – an elite, mass and universal tertiary education can be distinguished.

Table 1 shows the fundamental concept of elite, mass and universal higher education.

As can be seen from Table 1, one of the main reasons for the introduction of tuition fees is increasing number of students which puts pressure on state budgets. Regarding the improvement of the quality of study, these changes will

Table 1

Trow concept of elite, mass and universal higher education

	Elite (0–15 %)	Mass (15–50 %)	Universal (<50 %)
Attitudes to access	The privilege of origin and/or talents	Rights of those who have a certain level of qualification	The duty for middle and upper class
Functions of Higher Education	Formation of consciousness and the nature of the ruling class; preparation of elites	Transfer of skills, preparation wider technical and economic elites	Adaptation of the "entire population" to rapid social and technological change
The curriculum and forms of teaching	Highly structured according to the concept of academic and professional understanding of knowledge	Modular, flexible and semi-structured arrangement of courses	Breaking boundaries and sequences of courses; breaking the sphere of learning and practice
Students 'career'	"Sponsorship" from the end of secondary education; studies without interruption until the graduation	Growth in the number of later entering the university, increasing failure rate	Very shifted age of entry to the university, blurring the boundaries between formal education and practice, frequently interrupted study
Institutional diversity and characteristics	Homogeneity with high and uniform standards; small communities concentrated in the place of study; clear and impenetrable boundaries	The versatile nature and differentiated standards; "towns of intelligence"; mix of local and commuters; unclear and permeable boundaries	High diversity without uniform standards, a group of students, some of whom rarely or not even live in campuses; boundary weak / non-existent
The decision-making mechanisms	"Athenaeum" - a small elite group, shared values and expectations	Normal political process based on group interests and party programs	"General public" question the special privileges and prerogatives of academic sphere
Quality standards	Widely shared, meritocratic and relatively high	Variable; system/intuition becomes a "holding" of various types of academic activities	Transition from standard to "value added"
Access and selection	Meritocratic success based on performance in school education	Meritocratic and "comprehensive" programs to achieve equality of educational opportunities	Openness, emphasis on equality by group membership (ethnic, class, etc.)
Forms of administration	Part-time academics ("amateurs in administration"); elected/appointed for a limited time	Former academics, now fully engaged in administration; wide and growing bureaucratization	Specialized experts; managerial procedures adopted outside academic sphere
Internal control	Senior professors	Professors and younger employees; growing influence of students	The collapse of consensus, internal control is unsolvable problem; decision-making processes are moved to the political instance

Source: Trow (2006) in Prudký et al. (2010)

request multiple expenses, which are a heavy burden on the budget. The quality may then suffer. Given that fact Oliviera Martins et al. (2007) prefer the costs to be carried by private persons, since it has a positive impact on the possibilities of improving mass higher education.

Oliveira Martins et al. (2007) argues that the introduction of fees leads to raising the quality of studies and in addition to a competition increase among universities for students and thus to offer of better and more attractive branches. Differences between the amount of payments can attract different types of students (e.g. lower fees at local schools versus higher at prestigious international universities). These charges should lead according to Oliveira Martins et al. (2007) also to the fact that they will increase the interest of students finish the study, moreover, in less time and the excessive use of educational services will be reduced. Reduction in economic losses is also noted, the higher education classes are funded by all taxpayers. The system of fees and loans should eliminate this disparity. However, the segments of population who cannot reach the loan will be at a disadvantage. Higher classes will have more options to choose where to study.

The current crisis is increasingly inflected in many countries and in most cases describes the following aspects (Gherghina et al., 2010):

- Inability to pay the costs of tertiary education only through public budgets,
- Inability to effectively manage the resources allocated to tertiary education.

Due to the gradual changes that were not always carried out coherently and consistently the need for change tertiary education sub-finance is evident (Gherghina et al., 2010). From the 80th years in Western Europe or 90 years in post-communist countries there are gradual changes in tertiary education, when the financing was decentralized and national criteria for evaluating the outputs of the education system were established. Ideally, a new system of providing resources policy should be set up to support a direct link between finance provided and the resulting performance (i.e. quality of graduates).

And although the Bologna process has identified a number of beneficial actions on amendments to the tertiary education, agreement on ways and forms of financing have not been included in discussions (Oxford Analytica, 2012). At present, the Bologna Process has got to the stage where it needs to be carefully evaluated what has been achieved and to think about how to improve what has partly failed, tighten the reforms that have not been in the spotlight (MŠMT, 2012). Financing of tertiary education is one of them. However, students may benefit at least that they are able to move freely within European universities and they can choose where and how they want to study. The unsatisfactory conditions in connection with the financing can this way be bypassed.

In 2006 the European Commission set out the criteria which the tertiary institutions should meet so that investing state finance in it is appropriate and repayable. They are (1) the ratio of the volume of finance and school results, (2) focusing on funding contribution to the objectives of the society on the national level, (3) a focus of outcomes on long-term projects prospering the entire company, (4) ways of using the resources provided and work with them, including responsibility, and (5) the ability to transfer unused resources in the future years and projects. These criteria can help to determine to which institutions should be invested. Likewise, the can stimulate debate about whether and where the state funding is appropriate.

The year 2011 brought another recommendation from the European Commission. The agenda for tertiary education was published, which calls for more and better graduates due to the implementation of the Lisbon Strategy (Oxford Analytica, 2012). The Commission also highlighted the low average spending on tertiary education compared to other developed countries (1,3 % of GDP in the EU compared with 1,5 % in Japan and 2,7 % in the U.S.). It was subsequently transferred to the recommendation that finance should be primarily focused on building a "centre of excellence" in individual fields. The current economic situation of the countries, however, indicates insufficient implementation of these recommendations.

The reasons why the Czech Republic and other post-communist countries still did not widely apply principle and forms of tertiary education that are applied in Western Europe may be following (Nemec et al., 2011):

- Limited competition and short-term business strategies.
- "Insufficiently developed" democracy, where citizens cannot evaluate the decisions of the ruling minority.
- Limited "quality" of state law.
- Territorial fragmentation in some post communist countries.
- Relatively widespread and deep corruption in these countries.

The consequences of these assumptions in the theoretical background are further discussed below in the results of the work.

2 Material and methods

This article is based on an analysis of secondary sources, of which it compiles outputs verified by more resources. For interpretation are used charts and tables clearly indicating the essential outputs. Data for the analysis were drawn from OECD databases, professional, and scientific journals from the databases, from the Czech Statistical Office and Ministry of Education.

The design of methodology is based on a general model by Stevenson (1989), which defines four basic parts, which are: problem definition, model construction, model analysis and synthesis of findings. This model is respected and in the alleged contribution are processed first two points. Study of Czech and foreign authors literature was made as well as institutions, which are focused on tertiary education and tertiary education funding, trends in tertiary education and its development. The topics concerning the importance of tertiary education for socio-cultural and economic context of the European Union and the member states were processed in the theoretical background chapter. Subsequently the approaches to funding tertiary education and the possibility of alternatives, their benefits and drawbacks and theoretical bases are further elaborated by trends and sequence of development. For the research processing the methods of compilation and comparison of sources in order to identify gaps and contradictions in their beliefs were used (Stevenson, 1989; Disman, 2008). Based on the approaches mentioned above a table to compare approaches in Member States where tuition is already in place was prepared. Further the important points of these systems are mentioned. Based on the knowledge gained, there are the current trends in tertiary education described and the inferred development in the Czech Republic is deduced. These findings reflect modern approaches to working with the human capital and the development of the knowledge society as a priority of the Lisbon Treaty.

3 Results

Public funding of tertiary education is currently mostly based on the law formulation and with respect to the approved grant plans. In Europe, there are other (additional) systems, such as the possibility of negotiations on projects approved by the entity (applicable in Belgium, Bulgaria, Ireland, Cyprus, Luxembourg, Malta, Portugal and Slovenia) and through contracts set on specific objectives-based outputs (Belgium, Denmark, France, Luxembourg, Austria, Portugal, Romania, Slovak Republic and Finland).

Law given formulation is in most cases based on the input criteria and output criteria. In the Czech Republic the numbers of students entering are balanced by the costs of specific accredited courses and the annual increase in the number of students negotiated with the Ministry of Education and on output numbers of graduates once again with regard to the fields and form of study and the number of students who transcended the study period of longer than one year. In other countries, the specific criteria vary, they are e.g. shown in percentages for the number of students studying in the last year and a number of applications where there may be specific criteria for levels of study from undergraduate to doctoral (Ireland, Slovenia, Portugal, Finland, Sweden, United Kingdom, Bulgaria, Estonia, Italy, Romania, Poland, Denmark, the Netherlands and Latvia), as well as the number of professors and academics or departments (Greece, Hungary, Portugal, Poland and France) or the number of grants (Hungary, Austria, Bulgaria and Latvia). The output criteria focus particularly on student´s achievement and number of graduates. In the Czech Republic, Italy and Austria, there is an extra emphasis on compliance with the standard period of study. Most European countries, however, focus on the output of the results in functioning of the school (education), research and sometimes the number of graduates in specific fields (Great Britain, Ireland, the Netherlands, Finland, Sweden, Norway, Estonia, Latvia, Hungary, Romania). Percentage that can be obtained using the output varies. It ranges from 12 % to 50 %. But for example in Ireland and Italy the output plays almost no role, since the percentage rating is 5 % or less.

However, in Lithuania and Portugal, there are no output criteria precisely defined. Funding is based on the calculation of the share of the state budget or by a number of educational institutions and the determination of the state assessment.

It can be concluded that the majority of European countries focuses the evaluation mainly on the number of graduates, or their standard graduation. The advantage is the transparency of resource allocation, but it leads to further discussions on whether the system is satisfactory. The disadvantage could be favouring of students, lowering the quality of education (academic requirements) so that as many students as possible complete the study and as less as possible graduated prematurely, as it would be against the interests of the educational entity. Therefore, the emphasis should be on quality control and external evaluation of the particular entities.

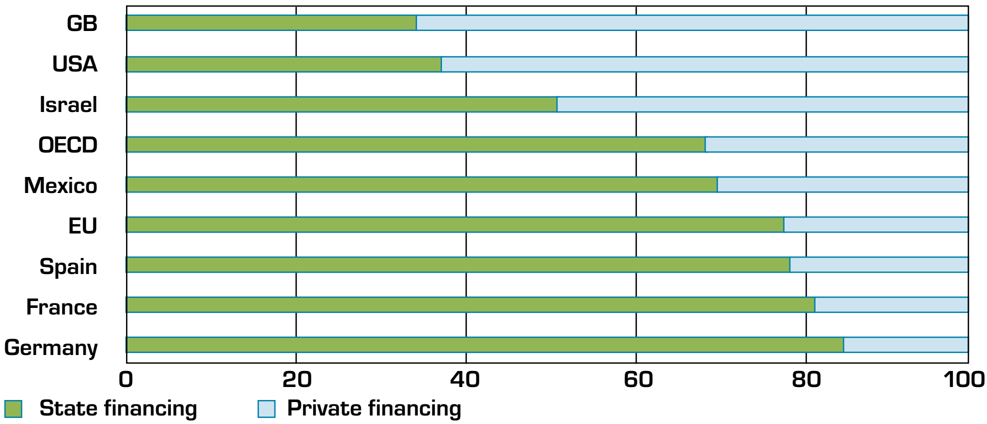
4 Systems of tuition

The ratio of public and private funding of tertiary education is a frequently discussed issue. However, the approach of individual states in the European Union varies and sometimes approaches rather non-European standards, where in the UK the ratio of private financing is even lower than in the USA. On the contrary, other European countries have rather high above the average public funding sources. A selection of state and private funding of tertiary education rate is shown in Figure 1.

In countries where systems of financing tertiary education through lending system exist, these systems are tied to the creditworthiness and students in fields that promise high future earnings (Oliveira Martins et al., 2007). Informa-

Figure 1

Percentage of public and private funding in selected countries



Source: adapted from Oxford Analytica (2012)

tion asymmetry calls for the guarantee of these loans or it is necessary that the loans are provided directly by the state. Satisfactory in this case are mortgage loans that are repaid relatively long time (as is the case in the Netherlands and Sweden, where the amortization period is 25 years – see Table 2). The system of tertiary education funding in the superiority of private funding in Table 2 is designed to reduce personal financial risk while providing direct support.

Table 2

Comparison of loans in European countries with an established tuition

	Holland	Sweden	Great Britain
Income threshold for repayments	€ 15.000 (40 % of the average annual salary)	None	£ 15.000 (52,5 % of the average annual salary)
Standard payment system	Mortgage repayments	Mortgage payments are rounded to 2 % per year	9 % of income above the threshold
The amortization period	25 years	25 years	–
Remission of debt	After 25 years of payments	At 70 years of age or death	Death / inability to pay / after 25 years
Subsidies during the study	Interest 3,05 %	30 % subsidy with interest 2,8 %	Interest (interest = inflation) 2,4 %
Subsidies after study	Interest 3,05 %	30 % subsidy with interest 2,8 %	Interest (interest = inflation) 2,4 %
% of working students	91,1 %	N/A	56 %
Average debt at graduation	€ 8.700 (23 % of the average annual salary)	230.000 SEK (74 % of the average annual salary)	£ 8.800 (31 % of the average annual salary)
Average income after graduation	€ 28.000 (87 % of the average annual salary)	290.400 SEK (94 % of the average annual salary)	£ 22.000 (77 % of the average annual salary)

Source: processed by Oliveira Martins et al. (2007)

Table 2 shows significant high percentage of working students. Thanks to this there is an ongoing refinancing and reducing of the financial risks associated with credit-financed education. This partly explains how it happens that the average debt at graduation achieves in some countries, less than 50 % (see penultimate row of Table 2).

Great Britain, however, introduced in 2010 further changes in the funding of tertiary education. This is a total shift of tertiary education funding from the state to private. Private tuition funding makes since that time 65,5 % of total expenditure on tertiary education (the EU average is 21,8 %). These reforms have increased tuition at £ 9.000 per annum and introduced method of successive installments, where the graduates with longer life expectancy and income pay substantially higher payments. This new system was created to improve the situation in the universities. It was assumed that an average of £ 7.000 will be needed to compensate the cuts in state funding, tuition, however, grew even more. This resulted in a fall in applications to UK universities by 8,7 %. Most of the decrease was recorded in humanities, arts and social sciences, where there was a 14 % decrease (Oxford Analytica, 2012).

Belgium, Czech Republic, Estonia, Greece, Ireland, Italy and Latvia since 2009 also took steps to increase the share of private funding of tertiary education. State funding of tertiary education has been affected more than research resources. Due to the long-term fiscal unsustainability of countries like Greece, Ireland, Italy, Portugal and Spain can in these countries be expected further cuts in state funding.

However, compared to these trends, Finland, France, Germany and Norway on the other hand increased budgets for public funding of tertiary education. In Germany, there was originally with the submitted amendments allowed universities to charge tuition fees to a maximum of € 1.000, but only a small number of universities took advantage of this and some of that tuition originally introduced is now again cancelled (Oxford Analytica, 2012). In the Netherlands there has been a rise in tuition fees only for students beyond the normal period of study or for those who study second master's degree. This resistance of most European countries to the introduction of tuition fees together with the reduction of government budgets on tertiary education leads to a reduction in the quality of education. For example, in 2007 the normative amount to one study in the Czech Republic was CZK 34.325 and in 2011 only 26.428 CZK. However, the number of students increased from 327.000 to 400.000 (MŠMT, 2011).

5 Likely development in the Czech Republic

Much discussed emphasis on creating opportunities for private funding of tertiary education, which was begun by the White Paper on Tertiary Education (Matějů et al., 2009), does not solve the overall underfunded status, but tries to follow the example of foreign systems and conform Czech higher education to existing social and economic conditions and thus closer to international standards. They, however, also include other interventions in terms of guaranteed loans and relatively long repayment system so that tertiary education was not the privilege of higher layers, as the current socio-economic environment requires a high number of graduates of tertiary education. There is a huge gap between private education where the student pays all the expenses of his studies, and public education, where is no motivation to share their own education, but on the contrary enhances unequal social conditions of study and reduces the competitiveness of schools. Financial disengagement of public university students by Matějů et al. (2009) and Oliveira Martins (2010) also contributes to a lower efficiency of this position of higher education because students do not take any significant responsibility for their studies.[1] White Paper (Matějů et al., 2009) therefore proposes to the following facts into account, shrink the gap between private and public education by the new system of grants, which should be provided from public funds also to the private high schools, and the introduction of tuition fees in public higher education system. While drawing inspiration mainly in the Scandinavian countries, where the direct support in the form of targeted social studies scholarships, study grants and student loans, is successfully applied. The good example, however, due to the current economic situation in the Czech Republic, are becoming also countries "which thrive in more markedly involve private funds and have less social barriers in access to education than the Czech Republic" (Matějů et al., 2009, pp. 45).

It can be said that through an appropriate state funding of tertiary education can be achieved increased competition and higher the quality of individual institutions. The state can play a role of supervisor of the effective redistribution leading to the development of education level.

Solutions in terms of following the trend of Great Britain and introduction of tuition fees funded from private sources in larger quantities, however, has its pitfalls. A decline in student interest and increased migration can be expected. It will likely be unsustainable in the long term and the EU Member States will have to begin to solve common/unified funding system within the agreements about tertiary education (see, for example Sorbonne and the Bologna Declaration). The agreement will be however difficult, because the public will push to maintain the current system, where the migration for some groups of students is still better than higher tuition fees.

6 Conclusion

In recent decades, the tertiary education system in Europe faced major transformations that have affected national and international changes, including a sharp increase in the number of students and a decline in state funding. At the same time in the global economy was and still is a significance of the research and innovation based on knowledge, which causes more and more obvious competition between tertiary education institutions. The ever increasing gap between prestigious international schools and schools of local importance, specializing in mass education, universal character, where is a need to provide education to ever wider segment of population, due to the shift of most employment opportunities from primary and secondary to tertiary sectors.

Tertiary education institutions are due to the set of evaluation fully responsible to the public for the way and form use of the provided resources. Responsibility can thus be understood in a number of forms. For this reason, in a number of European countries an external audit is practiced. Reports on the results of publications of newly discovered information in international scientific databases are also popular and frequently used methods. Most European countries, however,

1 *Further study after graduating at high school is chosen only as delaying adulthood; the period of study is without serious reason extended or they do not show greater ambition to successfully complete the study.*

use the measurement invoking the liability only to focus on student performance and results and activities related to research on individual entities for allocation of public funds.

It can be concluded that the approaches of individual states have a significant influence on others, as students due to the ease of migration conditions chose financially accessible university for them. This trend may lead to the fact that states will have to pay in some cases the price for students studying abroad or states will charge higher tuition fees for foreign students.

The current economic crisis and the effort to save on budgets may jeopardize the EU's efforts to increase the number of graduates of tertiary education and the overall effort of a knowledge-based society. The labour productivity growth is one of the most important solutions in developing a healthy economy. Therefore, the employment policies and strategies should follow the increase of investment in human resources, investment in training of young/adult, providing the access to the relevant information on education and training opportunities.

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FINANCING OF TERTIARY EDUCATION: THE CZECH REPUBLIC AND EUROPE

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ABSTRACT

In Europe, there are currently two main trends in funding of tertiary education: some states have reduced state contributions, but others use the opposite trend. Introducing of tuition at universities is currently also much discussed issue in the Czech Republic. The aim of this article is to describe the systems and trends in the Czech Republic and neighbouring countries, briefly introduce the concepts and their impact, and then discuss or recommend the possibility of their use and application in the Czech Republic. This article is based on an analysis of secondary sources, of which it compiles outputs verified by more resources. For interpretation are used charts and tables clearly indicating the essential outputs. Data were drawn from OECD databases, journals, CSO and the Ministry of Education. Findings summarize key findings and the current situation in tertiary education. It can be concluded that the approaches to individual states have a significant influence on others, as students, due to the ease of migration conditions, chose the financially accessible universities for them. However, due to the Lisbon Treaty EU committed to support education and development.

KEYWORDS

Education, finance, tuition, tertiary education.

JEL CLASSIFICATION

I22, I23

Možnosti ovplyvňovania organizačnej kultúry rozmiestňovaním zamestnancov*

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Úvod

Organizačná kultúra je niečo ako osobnosť podniku, vhodná organizačná kultúra by mala byť súhrnom spôsobov správania a konania tak podniku, ako celku, ako aj jeho jednotlivých zamestnancov na ceste za dosahovaním tak strategických cieľov podniku, ako aj osobných cieľov zamestnancov (Stachová 2013).

Vzhľadom na skutočnosť, že nositeľmi zmeny, resp. nositeľmi vhodnej organizačnej kultúry by mali byť všetci zamestnanci podniku, od ktorých sa očakáva, že budú zdieľať a rozvíjať strategicky potrebné predstavy, prístupy a hodnoty, je nevyhnutné zamerať sa na organizačnú kultúru a na ľudské zdroje simultánne, z uvedeným tvrdením sa stotožňujú autori ako: Schein 1999, Collins – Smith 2006, Lukášová 2010, Cow 2012 Urbancová 2012, Kachaňáková 2013, Čambál – Cagáňová – Sobrino – Košťál 2013. Možnosť pre takéto simultánne zameranie je daná previazanosťou organizačnej kultúry a riadenia ľudských zdrojov, ktorá je deklarovaná v ich spoločnej primárnej úlohe, ktorou je, ako uvádza Kachaňáková (2010): „vytvárať podmienky na tzv. pozitívne správanie zamestnancov v zmysle strategických zámerov a cieľov podniku“.

Z uvedeného vyplýva, že je potrebné zabezpečiť v podniku zhodu, respektíve, čo najväčší možný prienik, medzi hodnotami deklarovanými v rámci konceptu udržateľného rozvoja, presadzovanými hodnotami podnikom a hodnotami zamestnancov. Na to, aby bolo možné dosiahnuť čo najväčšiu mieru zhody medzi ľudskými zdrojmi v podniku a podnikom deklarovanými žiaducimi prvkami organizačnej kultúry, je potrebné prepojiť činnosti, v rámci jednotlivých funkcií riadenia ľudských zdrojov, s požadovanými hodnotami, postojmi a pracovným správaním. Takéto prepojenie je kľúčovým predpokladom pre pozitívne prijatie vhodnej organizačnej kultúry zamestnancami podniku, jej ukotvenie v ich správaní a následné zdieľanie a rozširovanie organizačných hodnôt.

Funkcia rozmiestňovania zamestnancov je špecifická tým, že je prvou funkciou ktorá ovplyvňuje zamestnancov po nástupe do zamestnania (za pomoci, ktorej sa orientujú a vytvárajú si prvé reálne, s praxou spojené obrazy o chode a skutočných hodnotách svojho nového podniku) a zároveň je poslednou, s ktorou prídu do kontaktu pri odchode z podniku (Wei 2010, Maloney 2011, Stachová – Stacho 2013). Z uvedeného dôvodu jasne vyplýva význam tejto funkcie vo vzťahu s organizačnou kultúrou, keďže v rámci z nej plynúcich činností sa nový zamestnanec oboznamuje, resp. neoboznamuje so všetkými prvkami organizačnej kultúry podniku (od hodnôt, až po prostriedky organizačnej kultúry). Súčasťou tej-

* *Článok je spracovaný ako jeden z výstupov výskumného projektu Stochastické modelovanie rozhodovacích procesov v motivovaní ľudského potenciálu – VEGA č. 1/0890/14*

to funkcie, je taktiež sledovanie a hodnotenie, či a do akej miery nový zamestnanec „zapadol" do podniku a taktiež zabezpečiť, aby si zamestnanec po skončení pracovného pomeru, zachoval pozitívny postoj k podniku.

V rámci predkladaného príspevku budú konkrétne definované jednotlivé činnosti, ktoré je za týmto účelom potrebné uskutočňovať. V rámci príspevku bude taktiež popísaný súčasný stav a úroveň zamerania sa organizácií pôsobiacich na Slovensku tak na organizačnú kultúru ako celok, ale aj zameranie sa organizácií na ňu v kontexte rozmiestňovania zamestnancov.

1 Organizačná kultúra ako osobnosť podniku

Organizačná kultúra je odrazom ľudských dispozícií myslenia i správania sa a pôsobí na ľudské vedomie i podvedomie. Posilňuje vzťah človeka k práci, upravuje aj vzťah medzi zamestnancami navzájom a výrazne vplýva na aktivitu zamestnancov (Kachaňáková, 2010). Všeobecne uvádzanými a deklarovanými prvkami organizačnej kultúry sú základné presvedčenia, hodnoty a normy, ktoré sa navonok prejavujú symbolmi a artefaktmi, ktoré sa v organizácii vymysleli, objavili, alebo vyvinuli v dôsledku úspešného riešenia problémov a tiež je spoločným prvkom skupina ľudí, ktorá je nositeľom organizačnej kultúry, v ktorej je táto kultúra zdieľaná (Čambál – Hoghová, 2008). Autori ako (Deal – Kennedy 1982, Schein 1999, Cameron - Quinn 1999, Collins – Smith 2006, Kachaňáková 2010, Lukášová 2010, Cow 2012, Joniaková – Blštáková 2013, Kachaňáková – Stachová 2014), spoločne uznávajú, že:

- Organizačná kultúra je významným subsystémom podniku, determinantou efektívnosti podniku a kvality pracovného života členov podniku.
- Organizačná kultúra nemá objektívnu formu svojej existencie. Existuje v podobe základných presvedčení, hodnôt, noriem a vzorcov správania, zdieľaných jedincami v rámci podniku. Navonok je manifestovaná prostredníctvom správania a artefaktov.
- Organizačná kultúra – napriek tomu, že existuje len prostredníctvom jedincov – je skupinovým fenoménom, ktorý má nadindividuálnu povahu.
- Organizačná kultúra je výsledkom procesu učenia, realizovaného v rámci riešení problémov vonkajšej adaptácie a vnútornej integrácii. Je nahromadenou skúsenosťou podniku, odovzdávanou v procese socializácie.
- Ako nahromadená skúsenosť podniku, odovzdávaná jednotlivcom v procese socializácie, je organizačná kultúra relatívne stabilná. Ako produkt dynamickej tendencie, vznikajúcej na základe neustáleho stretávania požiadaviek prostredia a interných možností podniku, avšak vždy obsahuje určitý potenciál ku zmene (Lukášová, 2010).

V nadväznosti na uvedené skutočnosti možno organizačnú kultúru chápať ako riadiacu zložku podniku, ktorá zjednocuje jednotlivé riadiace úrovne a vedie k tomu, aby organizačné ciele a spôsoby ich dosahovania boli akceptované a podporované všetkými zamestnancami. Každý celok, tvorený jednotlivcami a sociálnymi skupinami, sa riadi zložitým kultúrnym systémom, ktorý prispieva k vnútornému súladu tohto celku (Kachaňáková, 2010).

Existujúcu kultúru v podniku manifestujú navonok vonkajšie prvky kultúry a to prostriedky, ktorými sú symbolické artefakty materiálnej povahy, verbálne symboly, symbolické správanie a konanie a taktiež statusové symboly. Je na ne možné pôsobiť pomerne jednoducho a to prevažne priamymi opatreniami. Podstatne obtiažnejšie je možné pôsobiť na vnútorné prvky kultúry, ktorými sú hodnoty, postoje, presvedčenia. K ich vnútornému prijatiu zamestnancami nestačí využívať priame opatrenia, ale je potrebné na zamestnancov pôsobiť hlbšie a to nepriamymi nástrojmi. Dôležitú úlohu pri tomto pôsobení zohráva predovšetkým priamy nadriadený zamestnanca, ktorý by mal byť v pozícii inštruktora zmeny organizačnej kultúry a tiež systém jednotlivých funkcií riadenia ľudských zdrojov, prostredníctvom ktorých je možné vhodnú kultúru nielen šíriť, ale aj presadzovať.

Keď sa podnik rozhodne zamerať na organizačnú kultúru a na jej pozitívne nastavenie podporujúce udržateľný rozvoj podniku v súlade s víziou a cieľmi podniku, je žiaduce dodržať sled niekoľkých krokov, v rámci ktorých by malo prísť k naplneniu troch rovín, ktoré sú pri postupe utvárania vhodnej organizačnej kultúry nevyhnutné (Schein 1999, Lukášová, Nový, a kol., 2004, Pfeifer – Umlaufová, 1993). Ide o roviny poznania, nasmerovania a rovinu zavádzania, resp. ukotvovania vhodnej organizačnej kultúry.

V rámci dosiahnutia požadovaného stavu zmeny organizačnej kultúry podporujúcej udržateľný rozvoj podniku, uvádzajú autori, ako Lukášová – Nový, a kol., 2004; Hroník, 2013; Kachaňáková, 2010; Kotter – Rathgeber, 2008; Covey, 2013; Čambál, 2007; Welch – Welch, 2007; Armstrong, 2009; Koubek, 2010, že existuje viacero faktorov, ktoré majú významný vplyv na úspech, resp. neúspech celého procesu tvorby vhodnej organizačnej kultúry a taktiež viacero nástrojov, ktorými je vhodné zavádzanie vhodnej organizačnej kultúry podporiť. Vybrané funkcie riadenia ľudských zdrojov sú u autorov deklarované ako významné faktory a taktiež ako dôležité nástroje na dosahovanie cieľa procesu zmeny kultúry.

Jasne čitateľná organizačná kultúra sa stáva stále viac významnou pridanou hodnotou služieb a produktov ponúkaných organizáciou na trhu, determinantom vzťahov s obchodnými a ďalšími partnermi a hlavne odlíšením organizácie v očiach súčasných a potenciálnych zamestnancov a nástrojom riadenia a motivácie ľudí v organizácii (Uriga – Obdržálek, 2009). Na praktickú aplikáciu uvedeného je však potrebné, aby vrcholoví manažéri organizácií začali považovať organizačnú kultúru za reálny nástroj, ktorý je možné cielene a systematicky ovplyvňovať (zdokonaľovať, kultivovať, riadiť) a prostredníctvom ktorého je možné dlhodobo zabezpečiť dosahovanie požadovanej úrovne výkonnosti danej organizácie (Cagáňová – Čambál -Weidlichová – Luptáková, 2010).

2 Rozmiestňovania zamestnancov ako kľúčová funkcia pre dosiahnutie pozitívneho postoja zamestnancov

Rozmiestňovanie zamestnancov sa týka nových zamestnancov, prijatých z vonkajších zdrojov (úvodné umiestnenie počas prijímania, skúšobnej doby, adaptačného procesu), zamestnancov vracajúcich sa na svoje pracovné miesto po dlhšej dobe (po materskej dovolenke, po zranení, stáži...), vnútornej mobility zamestnancov (povýšenie, preradenie na inú prácu) a skončenia pracovného pomeru zamestnancov (prepúšťanie, rezignácia, odchod do dôchodku). Rozmiestňovanie zamestnancov je významné aj z pohľadu hlavného cieľa riadenia ľudských zdrojov, ktorým je dosiahnuť úspech a konkurenčnú výhodu prostredníctvom strategického rozmiestňovania schopných a oddaných zamestnancov a to na základe integrovanej sústavy kultúrnych a personálnych postupov (Kachaňáková – Nachtmanová – Joniaková, 2011). Aby podnik takýchto zamestnancov získal a následne po vstupe do podniku aj udržal, je nevyhnutné, aby sa zameral na ich adaptáciu (Blašková, 2011). Adaptáciu je všeobecne možné chápať ako proces aktívneho prispôsobovania sa človeka životným podmienkam a ich zmene. Pre každého človeka sú významné sociálne aspekty práce, vzťahy so spolupracovníkmi a pocit spolupatričnosti s pracovným prostredím, ktoré od prvej chvíle vedie k získaniu oddanosti a stability, alebo práve naopak, môže viesť k demotivácii, resp. nespokojnosti vyplývajúcej z nedostatku informácií a strachu zo zvládania pracovných úloh. Práve počas procesu adaptácie je vhodné vyjasniť si pracovné očakávania obidvoch strán a od začiatku nastaviť jasné a otvorené štandardy pre komunikáciu a spoluprácu (Kulíková, 2012).

Dĺžka adaptácie na novú prácu, nové pracovné, ale aj sociálne prostredie môže mať u rôznych ľudí odlišné trvanie. Ovplyvňujú ju rôzne subjektívne faktory, ako motivácia zamestnancov, schopnosť vnímať a učiť sa, odborná pripravenosť na výkon práce, zaužívané správanie, či návyky z predchádzajúcej práce, ako aj samotný postoj k práci. Ako objektívne faktory môžu pôsobiť na nového zamestnanca pracovné podmienky, organizácia práce, vzťahy na pracovisku, organizácia adaptácie novoprijatého zamestnanca, ale i rôzne mimopracovné vplyvy (Gyurák, 2011). Práve z týchto dôvodov je náročné striktne adaptačný proces formalizovať. Dôležité však je, aby sa proces adaptácie zameral na všetky tri roviny, v ktorých je potrebné, aby adaptácia prebehla. V rámci roviny pracovnej adaptácie je potrebné zabezpečiť vstupný zácvik a zaškolenie zamestnancov v rámci celkového formovania ich schopností podľa potrieb podniku a tiež definitívne konkretizovať umiestnenie nového zamestnanca na „správne“ pracovné miesto. V rámci roviny sociálnej adaptácie je potrebné dosiahnuť zaradenie zamestnanca do existujúceho systému medziľudských vzťahov na pracovisku aj v podniku (Kachaňáková – Nachtmanová – Joniaková, 2011). V rámci tretej roviny, ktorou je adaptácia zamestnanca na organizačnú kultúru je potrebné pomôcť novým zamestnancom orientovať sa v existujúcich sociálnych normách, štandardoch konania a správania, uznávaných hodnotách, ale tiež v statusových symboloch a ostatných prostriedkoch organizačnej kultúry, pričom cieľom je, aby sa s nimi zamestnanec v čo najväčšej miere stotožnil, prípadne prispôsobil. V rámci tejto roviny je potrebné v čo najkratšom možnom čase zmeniť pohľad zamestnanca z VY a VAŠA na postoj MY a MOJA.

Ak podnik musí pristúpiť k prepúšťaniu, či už z dôvodov červených čísel, alebo v dôsledku zavádzania novej technológie, či odstavenia výrobnej linky v dôsledku zmeny výroby, alebo z dôvodu zužovania a zefektívňovania organizačnej štruktúry, je dôležité, aby sa skutočnosť znižovania počtu zamestnancov nezatajoval pred zamestnancami podniku a zámery v tejto oblasti by mali byť naplánované dôkladne a včas. Predpokladá sa pritom aj poskytnutie pomoci pri hľadaní nového uplatnenia uvoľnených zamestnancov t.j. riadenie celého procesu skončenia pracovného pomeru (outplacement). Možností ako pomôcť prepúšťaným zamestnancom je niekoľko a to od podnikom organizovaných školení, zameraných na hľadanie práce, cez školenia, zamerané na sociálno-právne otázky a povinnosti, prípadne zabezpečiť finančné poradenstvo, poskytnutie možností absolvovania rôznych rekvalifikačných kurzov, cez psychologické poradenstvo, kvalitne prevedený uvoľňovací rozhovor, až po nájdenie vhodnej pracovnej pozície v inom podniku. Náklady na väčšinu možností pomoci pre prepúšťaných zamestnancov nemusia byť vysoké, pokiaľ podnik využije vlastné zdroje, ako napríklad zamestnancov z útvaru riadenia ľudských zdrojov, finančného a právneho útvaru a rovnako tak priamych nadriadených prepúšťaných zamestnancov.

Zodpovedný prístup k prepúšťaným zamestnancom, zabezpečí podniku do budúcnosti významný prínos v oblasti tvorby dôvery ostatných zamestnancov a imidžu podniku navonok.

3 Metodika realizácie výskumu

Prieskumy prebiehali v rokoch 2011, 2012 a 2013 vždy v období od februára do mája. Každoročne sa prieskumu zúčastnilo 340 organizácií, pričom spracovávanie dotazníka prebiehalo formou štruktúrovaných rozhovorov s osobou zodpovednou za riadenie ľudských zdrojov v dotazovanej organizácii. Pre stanovenie výskumnej vzorky sme si ako stratifikačné kritérium stanovili minimálny počet zamestnancov v organizácii 50, čím boli z výskumu na jednej strane vylúčené mikro a malé organizácie, avšak na druhej strane bola týmto kritériom výrazne zvýšená pravdepodobnosť, že organizácie budú mať zavedený formálny systém riadenia ľudských zdrojov. Súhrnná veľkostná štruktúra opytovaných organizácií je uvedená v tabuľke 1.

Tabuľka 1
Veľkostná štruktúra analyzovaných organizácií

Počet zamestnancov v organizácii	50–249	250–1 000	nad 1 000
Počet organizácií v rok 2011	221	92	27
Počet organizácií v rok 2012	214	102	24
Počet organizácií v rok 2013	228	85	27

Prameň: *Vlastné spracovanie*

Zber, zatriedenie a následné zosumarizovanie získaných informácií z prieskumov prebiehalo každoročne v období od júna do septembra. Medzi základné metódy realizovaného výskumu patrili logické metódy využívajúce princípy logiky a logického myslenia. Tieto metódy boli použité pri zisťovaní určitých javov v spojitosti s riadením ľudských zdrojov v analyzovaných organizáciách. Z tejto skupiny metód boli aplikované najmä metódy analýzy, syntézy, dedukcie a komparácie. Analýza bola použitá najmä pri štúdiu dostupnej literatúry a následnej identifikácii faktorov vplývajúcich na rozmiestňovanie zamestnancov v organizáciách. Syntéza bola použitá najmä pri spájaní čiastkových poznatkov, zistených vo fáze analýzy, do jedného celku, ako aj pri formulácii odporúčaní pre podnikovú prax. Komparácia bola použitá pri porovnávaní dotazovaných organizácií v rámci analyzovania ich zamerania sa na jednotlivé činnosti, ktoré vplývajú na silu organizačnej kultúry v podniku a na úroveň a komplexnosť rozmiestňovania zamestnancov v kontexte vplyvu veľkosti organizácie. Ako ďalšie boli v článku uplatnené matematické a štatistické metódy. Zo softvérových produktov dostupných na trhu bol vo výskumnej práci použitý textový editor, tabuľkový procesor a štatistický softvér. Konkrétne sa jednalo o MS Word 2007, MS Excel 2007 a štatistický softvér SPSS 15.0 for Windows®.

4 Výsledky uskutočneného výskumu

V rámci časti prieskumu zameraného na organizačnú kultúru bolo prioritne sledované, či si vedenia opytovaných organizácií uvedomujú dôležitosť a opodstatnenosť zaoberať sa tvorbou a udržiavaním vhodnej organizačnej kultúry. Väčšina opytovaných sa zhodovala v kladnej odpovedi na túto otázku. V odpovediach na podotázku „Prečo?“ sa najčastejšie objavovali odpovede typu: pretože zvyšuje motiváciu a chuť pracovať, z čoho vyplýva aj zvyšovanie výkonnosti a efektívnosti, pričom vytvára priaznivé