



CEDEFOP

European Centre for the Development
of Vocational Training

Competitiveness through people


Key insights from Cedefop surveys



Cedefop surveys



European skills and jobs survey



European company survey (ECS)



European AI skills survey



European Vocational Teacher Survey (EVTS)



Cedefop opinion survey on vocational education and training in Europe

European Training and Learning Survey (ETLS)



ETLS is the first European survey that maps how people gain knowledge and build skills at work.



RESPONDENTS

44 752

adult employed workers



Aged 16 to 64



From EU-27
plus Iceland & Norway



FOCUS



How workers
build skills at work



Participation in
learning activities



Workers' capacity
to do their job



WHAT IT EXAMINES



Workplace factors



Worker characteristics



Learning opportunities
and support

Employment relationships and skills utilisation

High road

High requirements –
high inducements



High requirements

Workers are required to draw on their skills
(beyond job description)



High inducements

Workers are supported in their efforts
to meet the requirements

Low road

Low requirements –
low inducements



Low requirements

Workers are required to do just the tasks
in their job description



Low inducements

Workers require little support, but they need
to meet low requirements

Improvement in employment relationships

 <p>Better talent retention Keep valuable people and reduce turnover.</p>	 <p>Higher engagement Motivated people contribute more and stay longer.</p>
 <p>More training provision Invest in skills that build capability and performance.</p>	 <p>Stronger recruitment Attract the right talent more easily and effectively.</p>

Source: Cedefop / Eurofound, European Company Survey (2019)

Evidence on employment relationships



**Low requirements –
low inducements**

13%
of EU establishments



**Moderate requirements –
moderate inducements**

30%
of EU establishments



**High requirements –
moderate inducements**

38%
of EU establishments



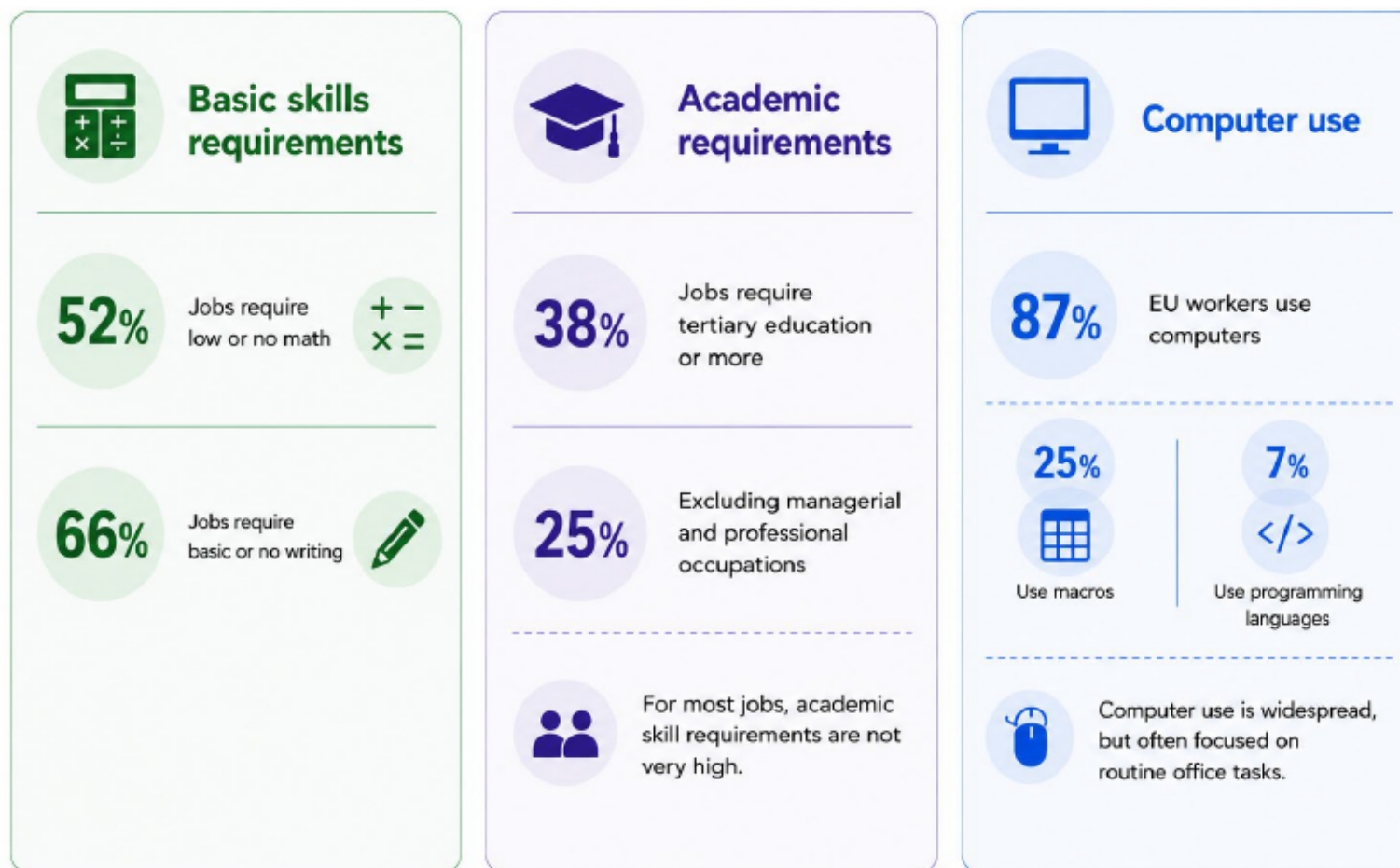
**High requirements –
high inducements**

19%
of EU establishments



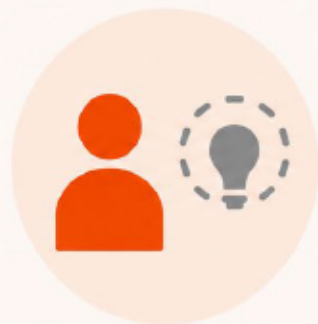
Source: Cedefop / Eurofound, European Company Survey (2019)

Evidence on skills requirements



Source: Cedefop, Second European Skills and Jobs Survey (2021).

Evidence on skills utilisation and skills match



Skills under-used

40%

of workers feel their skills
are not fully utilised



Source: First European Skills
and Jobs Survey (2014)



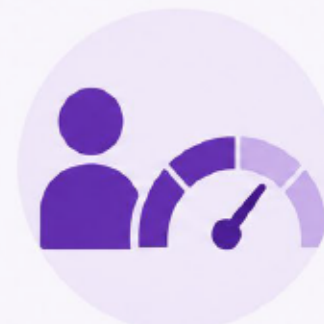
Skills catch up over time

86%

of workers who started
underskilled later become
matched or overskilled



Source: First European Skills
and Jobs Survey (2014)



Productivity gap

65%

of workers have scope to
do their job better



Source: Second European
Skills and Jobs Survey (2021)

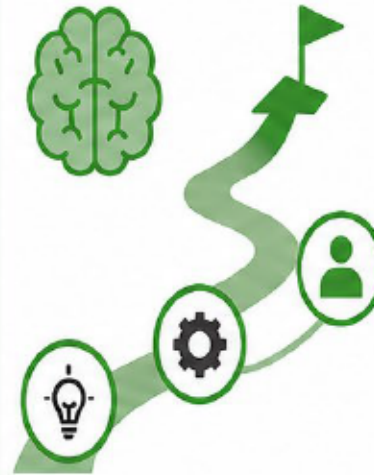
Learning activities and skills development

Participation in learning activities



- ✓ Shows workers' effort
- ✓ Records engagement in learning activities
- ✓ Does not by itself capture what is learned

Learning and skills development

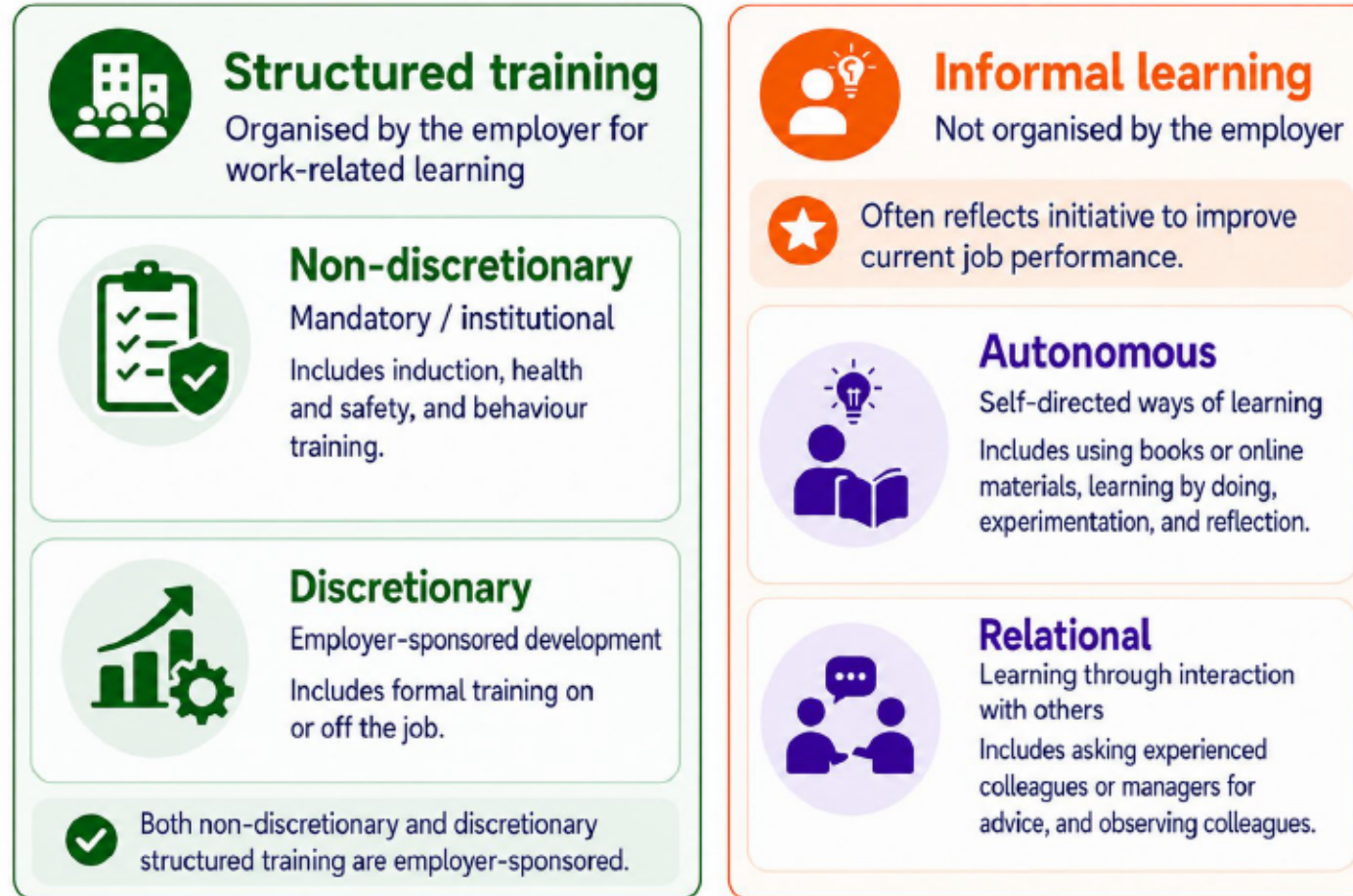


- ✓ Output of a longer process
- ✓ Nonlinear and unpredictable
- ✓ Different activities lead to different learning outcomes

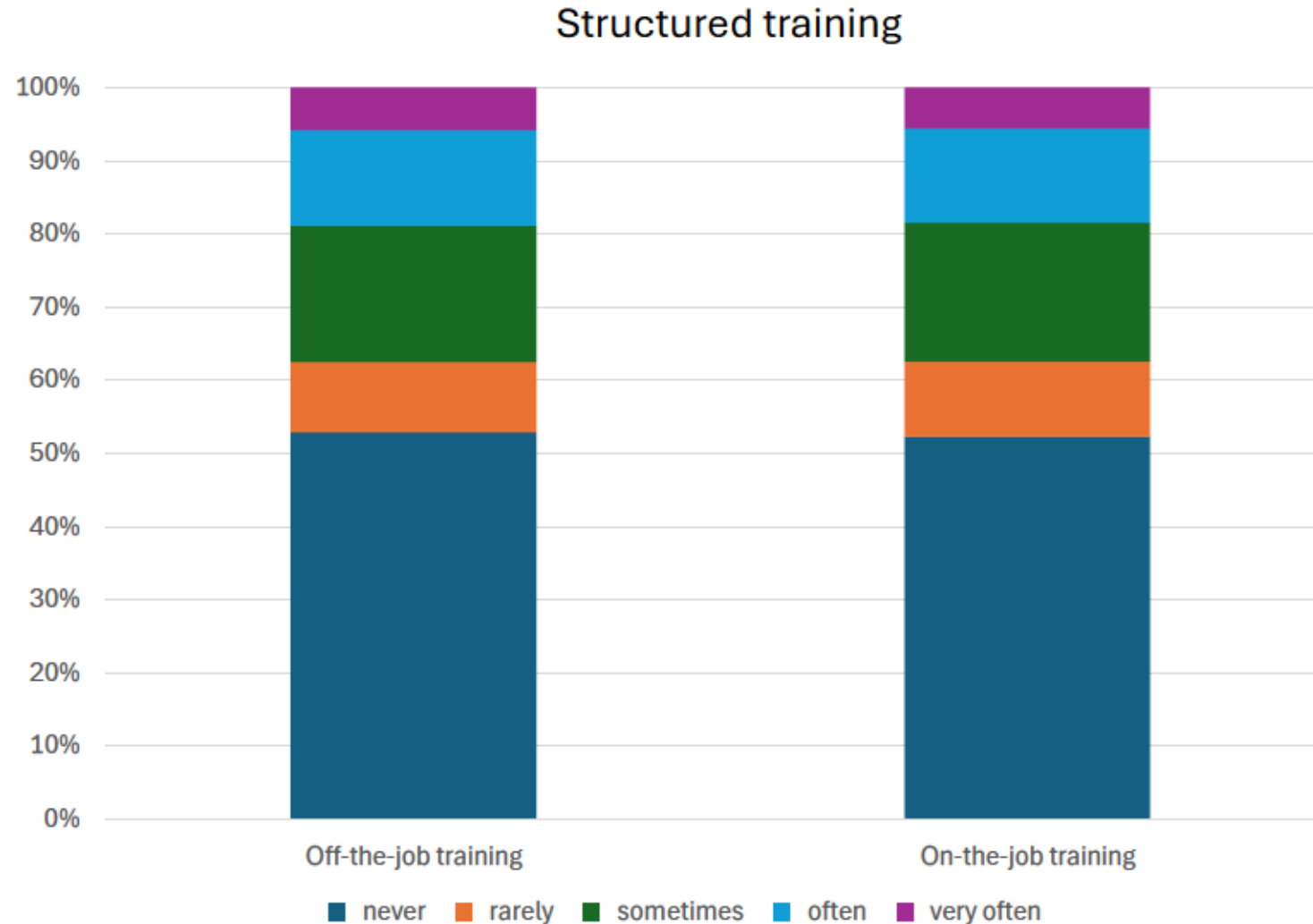


Source: Cedefop, European Training and Learning Survey (2024).

Types of learning

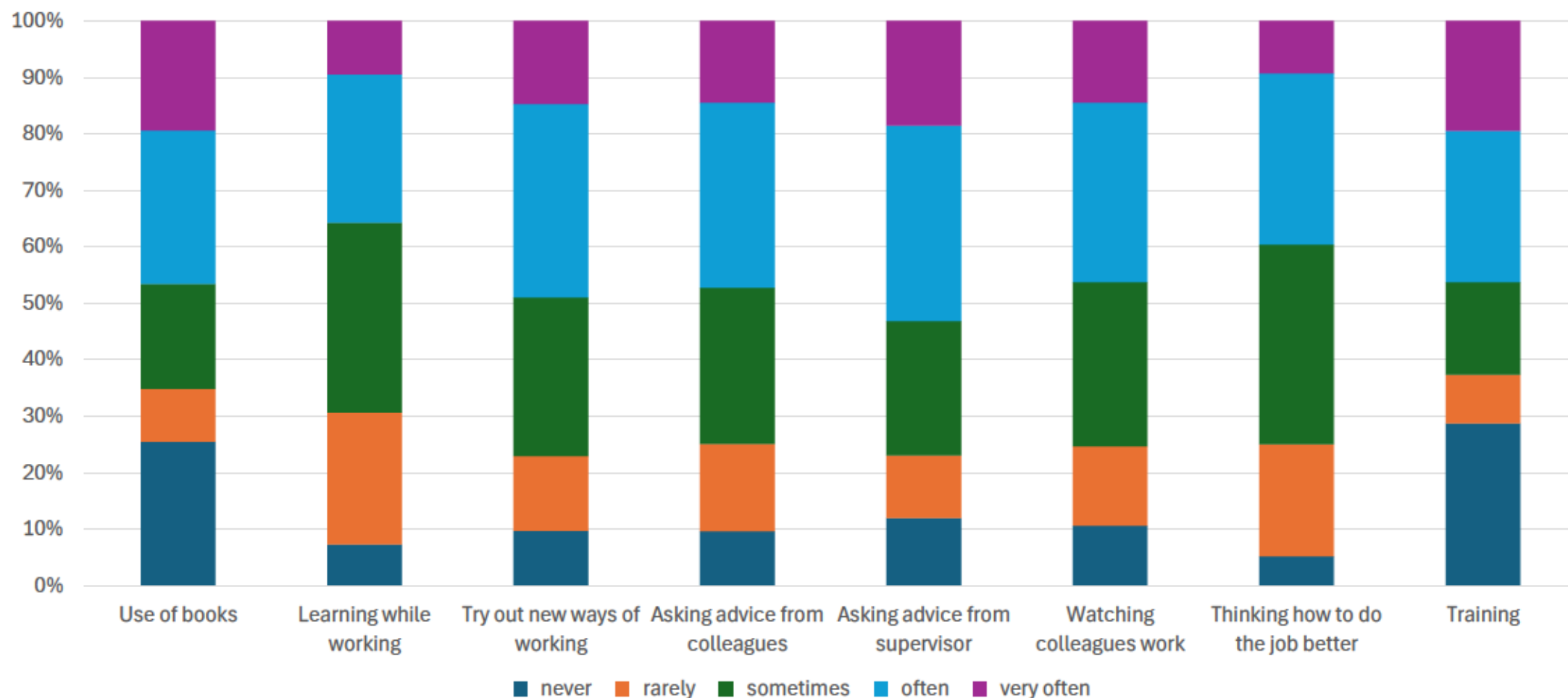


Frequency of participation in various learning activities

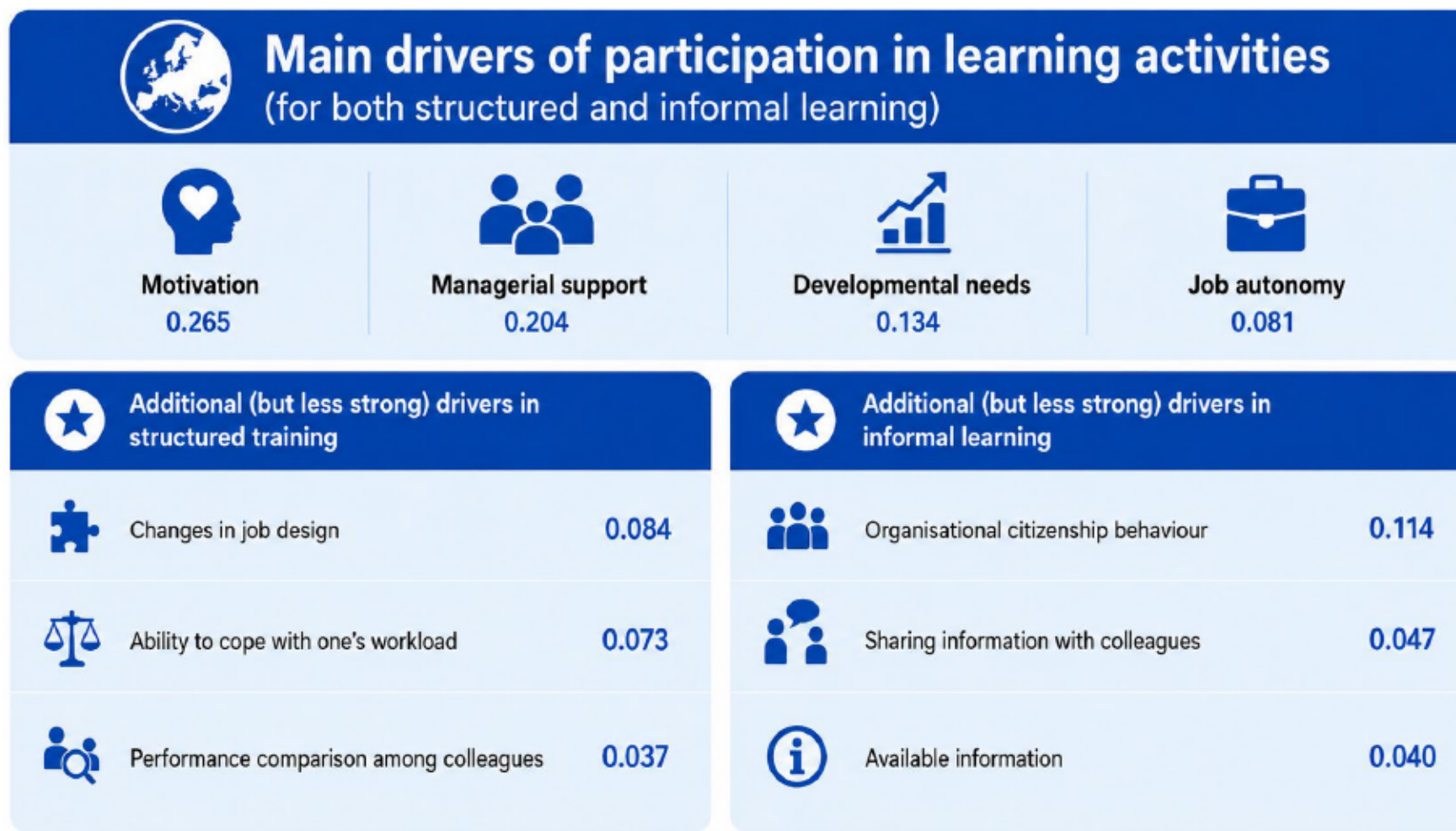


Frequency of participation in various learning activities

Informal learning



Drivers of learning



Workplace conditions co-shape skills development

1. Technology and digital skills



Higher digital skill needs increase structured training.



Advanced technologies also require more informal learning.

2. Job complexity



Routine jobs

Rely more on structured training



Changing jobs

Need more informal learning

3. Age and gender



Older workers

May need stronger structured training support



Women

May face greater barriers to structured training



Human-centred managerial decisions matter

Technology alone does not raise productivity.
Workers need the right conditions to learn, adapt and use their skills effectively.



Building a learning culture

1 Why a learning culture matters



- ✓ Much workplace learning is not directly observed or measured
- ✓ Employers often overlook learning beyond formal training
- ✓ Learning benefits go beyond simple cost-benefit analysis
- ✓ Informal learning is the most effective type for skills development

What is unseen still shapes performance.

2 Why it pays off



Better choices



Higher efficiency



Stronger profits



Skill development

Learning effort improves decisions and organisational performance.

3 Industry 5.0: learning with responsibility



AI and advanced technology give workers more power



Workers need to understand what they do



Good decisions matter for others and raise ethical responsibility

How to do things right



Technical

VS.

How to do the right thing



Ethical

People often learn willingly when conditions support it.

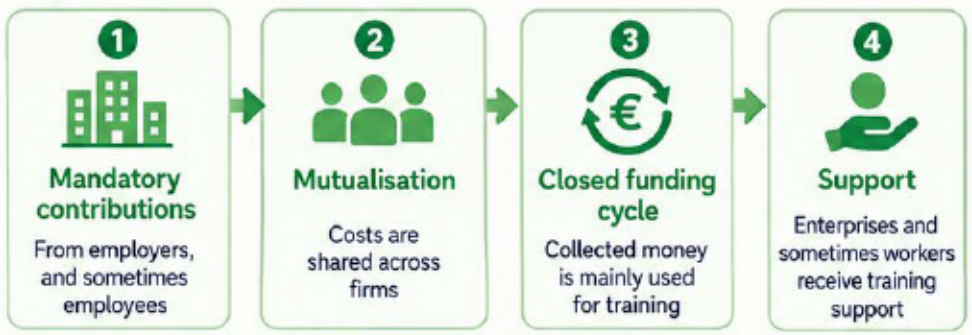
Example: training funds

1 What are training funds?



- ✓ Institutions that finance initial and continuing vocational education and training (IVET/CVET)
- ✓ Employers are required to contribute, usually through a levy or earmarked social contributions
- ✓ Funds are pooled across enterprises and mainly reinvested in training

2 How they work



3 Governance



- ✓ Business organisations and social partners strongly shape how funds are used
- ✓ Employees may also benefit and be represented

4 Basic characteristics



Key role
Support training finance, governance, relevance and quality



Highly diverse
They differ in goals, governance, funding and target groups



Usually national or sectoral
National: often tripartite and law-based; Sectoral: often bipartite and agreement-based



Country-specific models
Example: inter-professional CVET funds in Italy

Example: Chambers of Commerce



Chambers of commerce help organisations innovate, develop people and adopt technologies for a high-road, people-centred future.

1 Build teams of consultants



Expert teams with multidisciplinary skills in innovation, people and transformation.

2 Support organisations in the transition



- ✓ Assess needs
- ✓ Design solutions
- ✓ Build skills and learning cultures
- ✓ Connect to funding and networks

3 Recognise and promote successful employers



Celebrate employers who achieve a high-road transition.



Inspire and mentor others in the territory.

4 Strengthen the territory through collaboration



Bring together businesses, education, public authorities and social partners.



Build a more innovative, inclusive and sustainable skills ecosystem.

ETLS conference



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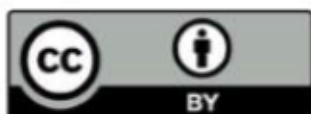
The skills nexus between productivity and job quality

Strengthening foundations for a
competitive Europe

Conference

29 and 30 June 2026 | Thessaloniki, Greece

Thank you



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