Survey of training providers

The future of vocational education and training in Europe Volume 2

Delivering IVET: institutional diversification and/or expansion?

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CHAPTER 1.
Introduction

Cedefop's Future of VET study, amongst other things, explored the way in which a range of factors have impinged upon the provision of vocational education and training (VET) over the last quarter of a century. In particular, it has focused upon the the way in which factors largely external to VET systems, such as technological and demographic changes, elicit responses from actors within VET systems and how these have changed over time. The way in which this has had an impact upon VET institutions, the relationship between VET and general education, and the level at which VET have all been in Delivering IVET: Institutional Diversification and/or Expansion?, the second volume of findings from the Future of VET study.

A key actor institututional actor within VET systems are vocational schools.[1] In other words the institutions responsible for delivering the formal education and skills development required within formal, accredited VET programmes. Ultimately, it is vocational schools which have the responsibility for conferring knowledge and skills on leaners. From a European perspective there is an interest in the variation between countries with respect to what is delivered and how, alonsgide the degree of change which has been experienced over the last twenty five years or so. Here there is a specific interest in:

- the characteristics of vocational schools;
- funding and autonomy;
- the content of VET delivered to students;
- assessment;
- provision of VET at higher levels; and
- expectations regarding the future of VET over the next 10 years.

In order to explore the role of vocational schools as an institutional actor within VET systems a survey of senior personnel in those schools with a responsibility for course and programme delivery was undertaken. This contributed to the aforementioned report - Delivering IVET: Institutional Diversification and/or Expansion? – and other elements of the Future of VET study.

Further details about the survey are provided in the next chapter. The survey was conducted online by personnel within vocational schools who were able to provide an overview of the courses, programmes, and qualifications delivered and how the

[1] The concept of a vocational school is potentially a flexible one. It might be a standalone institution recognised by relevant authorities for the delivery of a range of vocational programmes, or it might be part of a larger organisaiton which delivers other kinds of courses but which has separate divisions or departments concerned with the delivery of, respectively, vocational and general programmes. It is also recognised that there are likely that the names given to vocational schools will vary by country.

provision of these has changed over time. This tended to be principals or heads of vocational schools or other senior personnel within a school.

The survey is not necessarily representative of all vocational schools across countries in scope of the Future of VET study. For this reason the results should be regarded as indicative rather than definitive. That said, the findings presented in the remainder of this report give insights into how the role of vocational schools has changed over time.

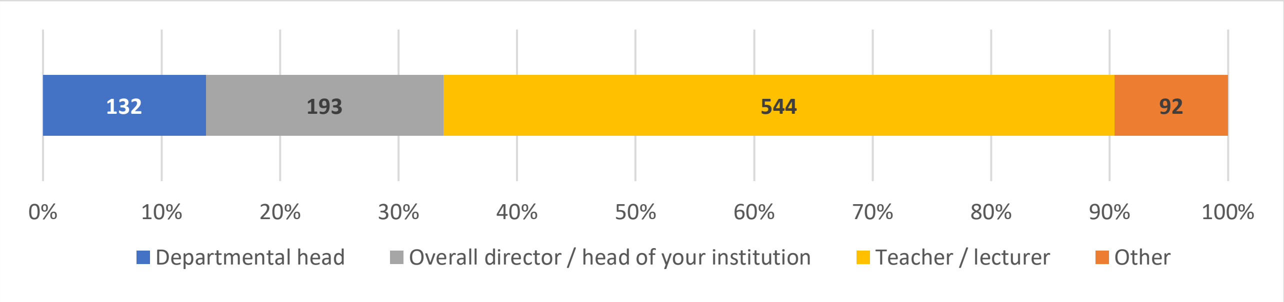
Please note, the survey was undertaken during 2021/22 when the effects of COVID-19 on the labour market and participation in education and training was still very much in evidence.

CHAPTER 2.
The survey

The survey was addressed to management staff and teachers / lecturers in vocational schools who were able to provide information about developments in the delivery of VET at their institution over the relatively recent past. The survey was distributed to vocational schools by national experts in those countries in scope of the Future of VET study who, in some instances, also used national network organisations to distribute the questionnaire. Several pan-European organisations also raised awareness about the survey amongst their memberships in order to further stimulate responses. Overall, 963 respondents replied to the survey. There were two responses from two organisations. This means that 961 vocational schools responded to the survey.

Over half of all respondents were teachers (57%), 20% were directors / principals, and 14% were department heads. The remaining 10% included managers, specialist consultants and officers, support staff and HR personnel (see Figure 1).

Figure 1: Characteristics of respondents



Source: Cedefop Future of VET Survey of Vocational Schools

A response was received from all EU member states, plus Iceland, Norway, Sweden, and the UK. Two responses were received from vocational schools outside of the EU (see Table 1). While the data provide for limited analysis by individual countries it does lend itelf to the analysis of aggregate analysis across all countries and potentially blocs of countries. Here the analysis is limited to that of all countries (and selected countries with a sizable number of responses), but there is scope for further analysis to consider the type of labour market / education regime in place (cf. the varieties of capitalism discussion which tends to groups countries with reference to the market influence versus co-ordinated approaches).[2]

[2] Cedefop's study entitled Changing Nature and Role of Vocational Education and Training, which was a precursor to the Future of VET study, addresses this issue.

Table 1: Location of respondents' institutions

Country	Number of respondents	Country	# of respondents
Spain	273	**Cyprus**	4
Croatia	193	**Denmark**	4
Poland	160	**Slovakia**	4
Romania	138	**Hungary**	3
Italy	32	**Estonia**	2
France	26	**Greece**	2
Netherlands	23	**Iceland**	2
Austria	14	**Lithuania**	2
Finland	12	**Malta**	2
UK	12	**Belgium**	1
Slovenia	10	**Czechia**	1
Ireland	9	**Luxembourg**	1
Latvia	9	**Norway**	1
Germany	7	**Sweden**	1
Bulgaria	6		
Portugal	5	**Non-EU countries**	*2*

Source: Cedefop Future of VET Survey of Vocational Schools

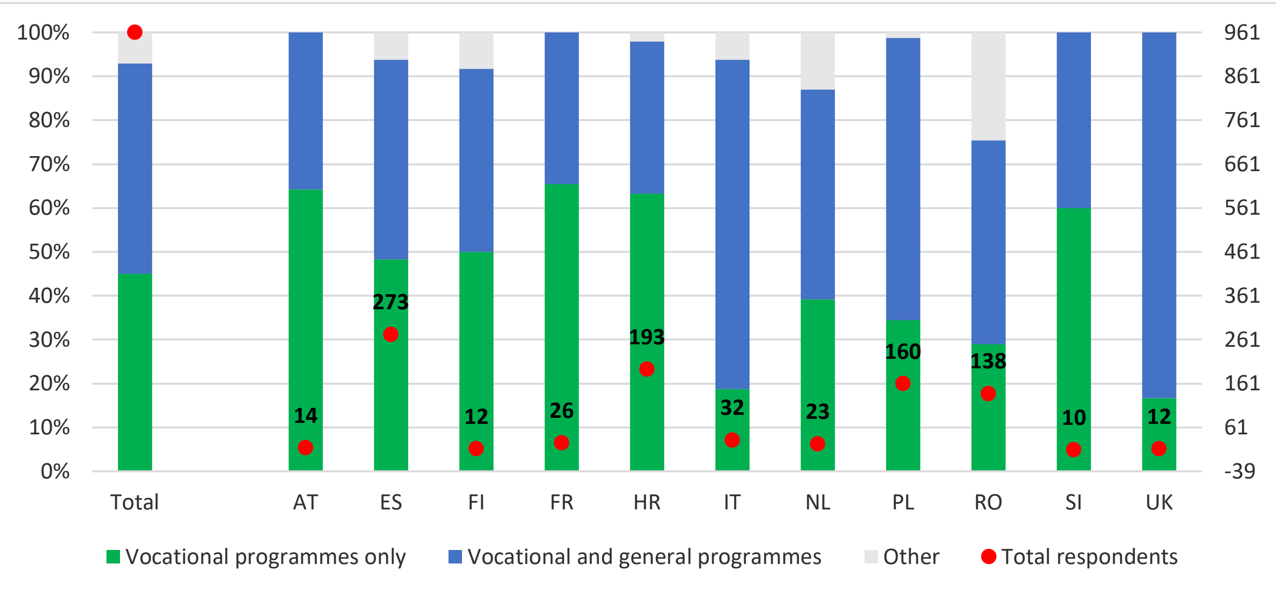
CHAPTER 3.
Characteristics of vocational schools

Information is provided below on the characteristics of vocational schools, such as their size and funding, and how these have changed over the past 10 years. While the focus of the Future of VET study was on looking at change over the past 25 years, the survey concentrated on change over the past 10 years since respondents are more likely to recall events over that period rather than the past quarter of a century.

3.1 Characteristics of the institutions

The sample was evenly split between respondents representing hybrid institutions (i.e. organisations delivering both vocational and general programmes), and institutions providing vocational programmes only (48% and 45% respectively). There is variation by country (see Figure 2).[3] In AT, FR, HR and SI most respondents were from institutions providing vocational programmes only (63% on average), while IT and the UK stand out with the high share of respondents from hybrid institutions (79% on average).

Figure 2: Type of institution by country



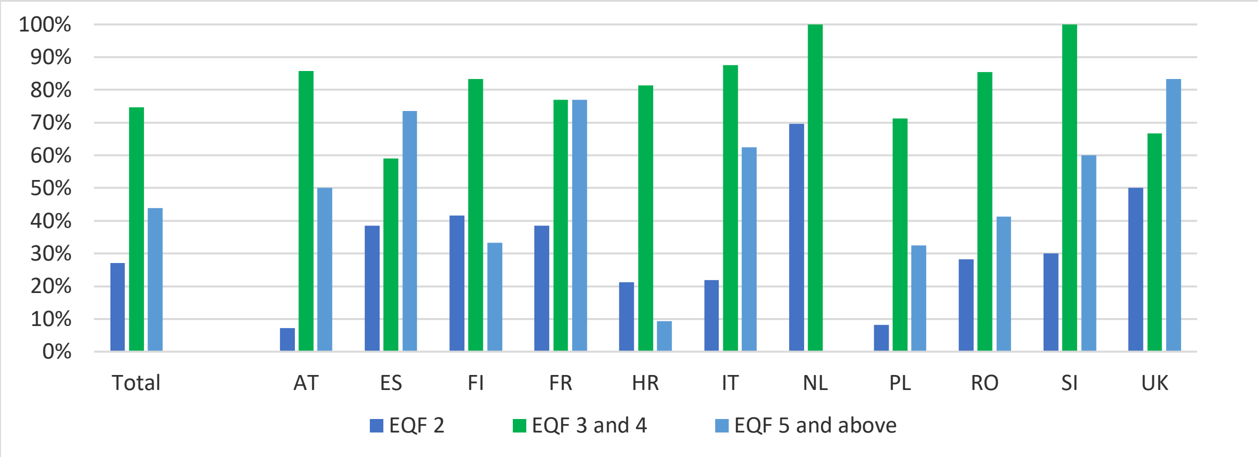
Source: Cedefop Future of VET Survey of Vocational Schools

Most vocational schools provided VET at the upper secondary level (75%), 40% provided it at post-secondary or higher education levels, while a smaller share delivered training at the lower secondary level (27%). Across all countries vocational schools delivered courses at EQF levels 3 and 4. This was particularly marked in NL and SI where all the vocational schools surveyed delivered training at this qualification

[3] Analysis at the country level was undertaken only for those countries with 10 or more respondents, namely AT, ES, FI, FR, HR, IT, NL, PL, RO, SI, and UK (see Table 1).

level. The share of institutions providing VET at the EQF level 5 level or above is especially high in the UK and FR (83% and 77% respectively).

Figure 3: EQF level of provision by country



Source: Cedefop Future of VET Survey of Vocational Schools / Note: Multiple answers allowed

As shown in Table 2, the vast majority of respondents' institutions delivered IVET to students/young learners who were yet to enter the labour market (87%), and 42% to adults (either in or out of the labour market). Fewer institutions delivered VET to apprentices who were in employment and/or to young people in workplace-based training (31%). Consequently, most learners (72%) were aged between 14 and 18 years, with just over half (53%) aged 19 to 24 years. Relatively few institutions (33%) addressed the learning needs of those aged 25 years or older.

Table 2: Type of learners addressed by vocational schools

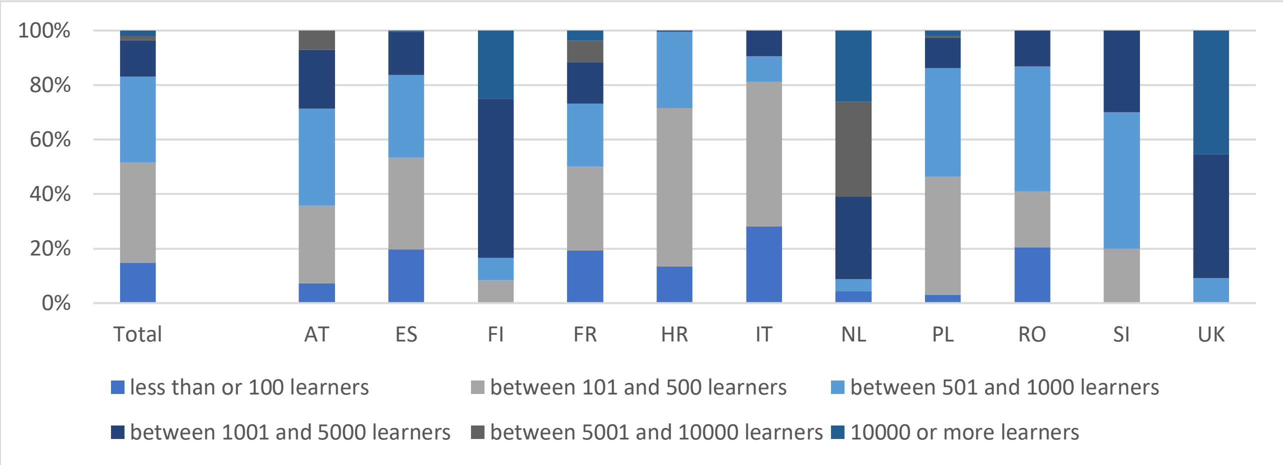
Type of learners	No. of respondents	%
Students/young learners who are yet to enter the labour market	836	87%
Adults either in or out of work	404	42%
Apprentices who are employed / young people in workplace-based training	300	31%
Other	50	5%
Age of learners		
14 – 18 year olds	692	72%
19 – 24 year olds	505	53%
25 years and older	315	33%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: Multiple answers allowed

Most respondents (37%) worked in mid-sized vocational schools with 101-500 learners, and 31% in vocational schools with 501-1000 learners (31%). Fewer respondents (15%) represented smaller vocational schols with 100 or fewer learners. A similar share (13%) represented large institutions (1001 to 5000 learners) with the remaining 4% representing vocational schools with over 5000 learners. As shown in

Figure 4, all countries tended to reveal a similar pattern with respect to vocational schools size. The exceptions are FI, NL and the UK where most respondents (over 80%) were from institutions with 1000 or more learners (compared with an overall average of 17%).

Figure 4: Size of vocational schools represented in the survey



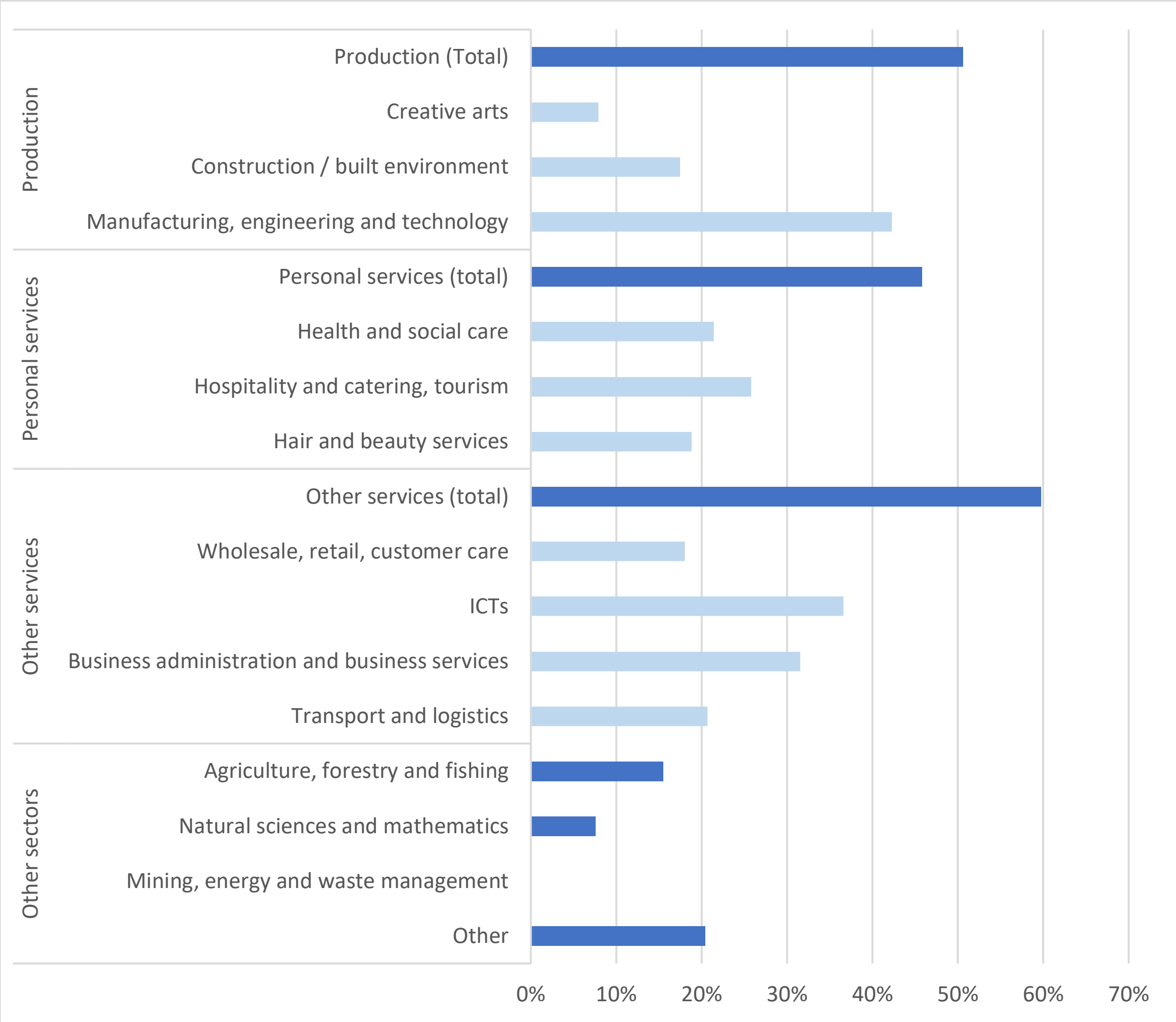
Source: Cedefop Future of VET Survey of Vocational Schools

Vocational schools represented in the survey served a number of different sectors. Just over 40% reported that manufacturing, engineering and technology were the main subject areas of their courses, 37% delivered training mainly in ICT, and 32% in business administration. Sectors were clustered into three categories:

1. 51% delivered training with at least one subject area classified as ‘production’;
2. 46% delivered at least one ‘personal service’ course or prohramme; and
3. 60% delivered courses in ‘other services’ category.

Figure 5 below provides more details.

Figure 5: Main subject areas in which training is delivered

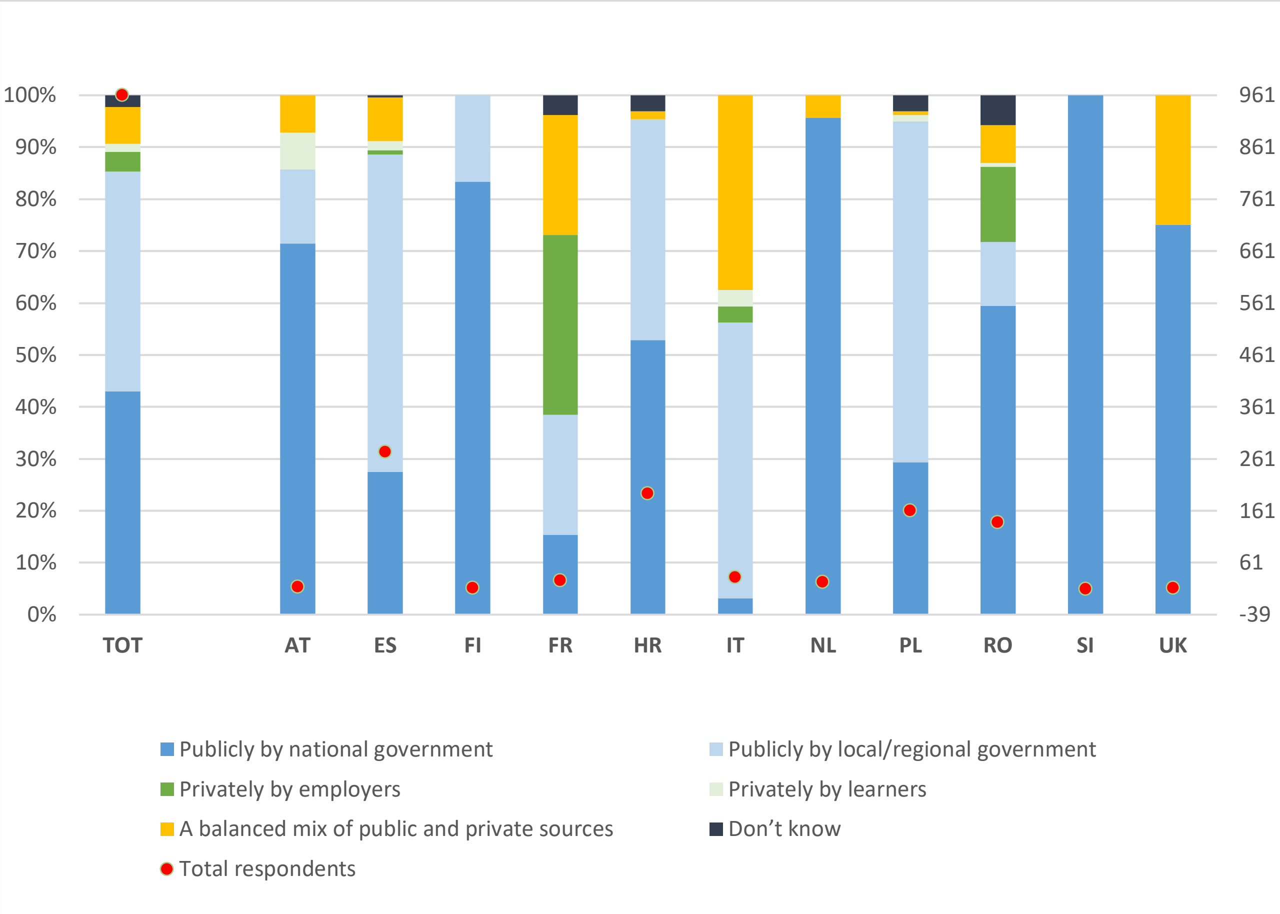


Source: Cedefop Future of VET Survey of Vocational Schools / Note: Multiple answers allowed

3.2 Funding sources

The vast majority of vocational schools were publicly funded either by national government (43%) or by local/regional ones (42%) with 6% privately funded, 4% funded by employers, and 2% by learners. A balanced mix of public and private sources was evident in 7% of cases (see Figure 7). There were some variations by country. In FR and IT, the share of institutions publicly funded was smaller than that recorded across all countries (38% versus 56%). In FR, 35% of vocational schools in the survey were privately funded by employers, the highest share recorded for this type of funding. A relatively high share of vocational schools using a balanced mix of public and private sources was recorded in IT (38%), FR (23%), and the UK (25%).

Figure 6: Main funding source by country

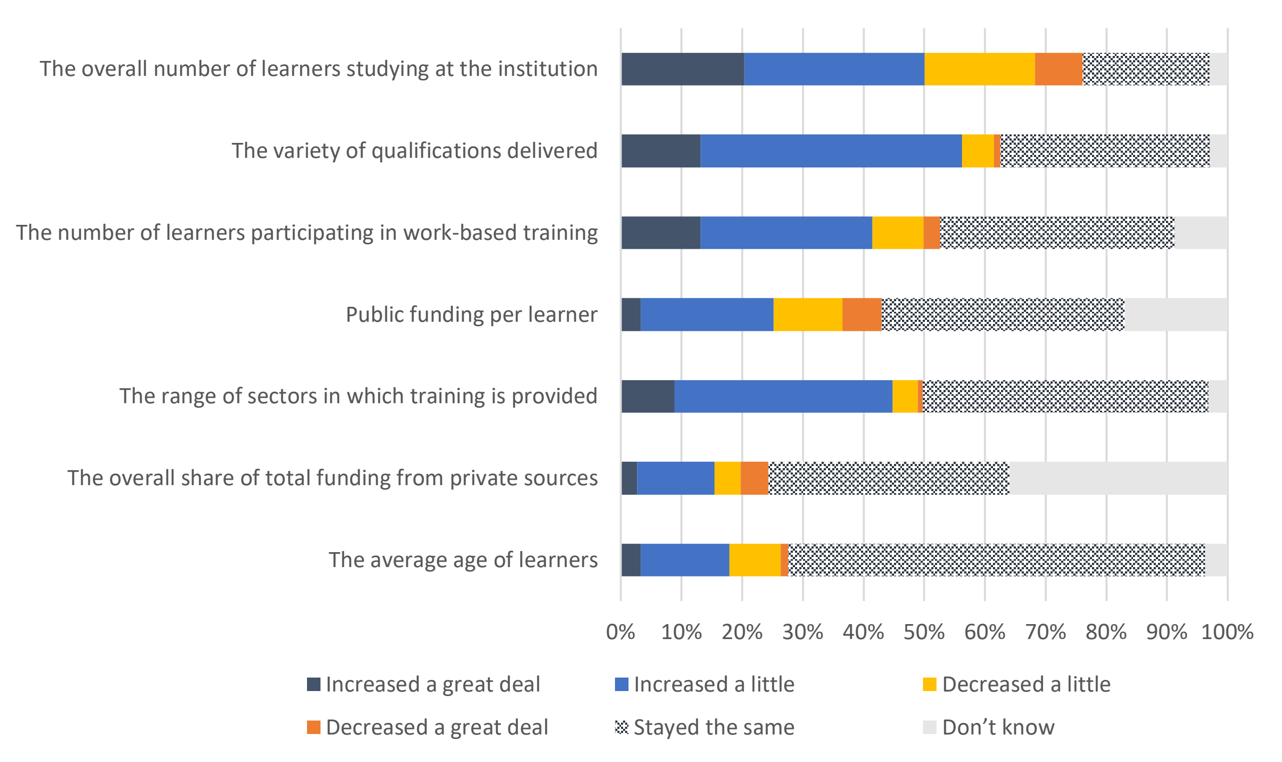


Source: Cedefop Future of VET Survey of Vocational Schools

3.3 Changes occurred over the past 10 years

Respondents reported numerous changes that had occurred in their vocational school over the past 10 years. Most changes – both in terms of increase and decrease – occurred in terms of the overall number of learners, the variety of qualifications delivered, and the number of learners in work-based training. Fewer changes were observed in terms of the age of learners and the range of sectors in which training was provided (see Figure 7).

Figure 7: Changes over the past 10 years in the provison of VET by vocational schools



Source: Cedefop Future of VET Survey of Vocational Schools

As shown in Figure 7 the overall number of learners has increased in half of all institutions (50%), while decreasing in a quarter of them (26%). Over the same period, the variety of qualifications delivered by vocational schools changed: 56% said they had increased the type of qualification offered, while 6% said it had decreased, with, 35% reporting no change.

Most respondents also reported a change in the number of learners participating in work-based training, i.e. it had increased in 41% of vocational schools while it had decreased in 11%. Also the range of sectors to which training was supplied increased in 45% of cases while it decreased in 5% of them. For both options, a sizable share of vocational schools experienced no change (39% and 47% respectively).

The amount of public funding for each learner increased in a quarter of cases while it decreased in 18% of them. The share of private funding had not changed much over the past 10 years, i.e. it increased in 15% of cases and it decreased in 9% of them. In both cases the share of respondents reporting no change was substantial (40% for each option, funding per learner and share of private funding respectively).

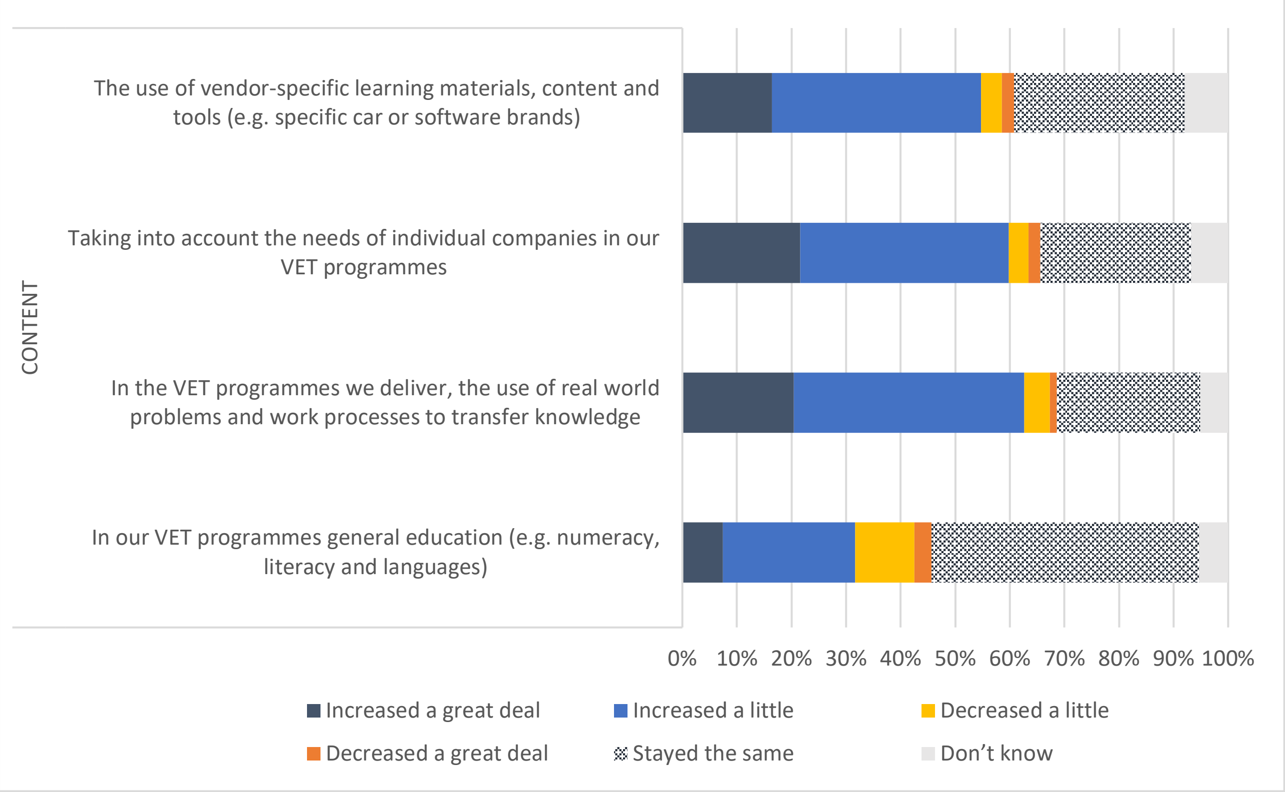
CHAPTER 4.

Changes in training content and delivery

4.1 The content of the VET

With respect to the means used to deliver VET content, as shown in Figure 8 below, the majority of vocational schools had increased the use of real-world problems and vendor-specific learning materials. The change affected, respectively, 60% and 55% of cases. In addition, an increasing number of vocational schools had taken into account the needs of individual companies in their VET programmes (i.e. 60% of respondents observed an increase in this type of content). In 6% of vocational schools there had been a decrease in the use of any of the above-mentioned types of training. Finally, around half of all vocational schools in the survey (49%) had experienced no change in terms of the level of general education (i.e. with respect to numeracy, literacy and languages) in their VET programmes. The level had increased in 32% of cases.

Figure 8: Changes in the VET content over the past 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

No substantial differences were observed between institutions providing only vocational programmes and those offering a mix of vocational and general programmes or at the country level.

For most institutions (55%), the changes in VET content had led to an increased focus on digital and computer skills (see Table 3). Many respondents also flagged an increase in the depth of vocational expertise and specialisation provided (34%), the provision of skills related to working with others (30%), the breadth of vocational expertise (29%), and the provision of social and communication skills (29%). Only a few institutions increased the focus on foreign languages, numeracy and literacy skills (5% on average for each option). Other options, selected in a small number of cases (1%), included problem-solving skills and change management.

Table 3: Types of changes introduced in the content of VET over the past 10 years

The VET content changed in:	No. of respondents	%
Digital / computer skills	531	55%
Depth of vocational expertise and specialization	330	34%
Being able to work with others	291	30%
The breadth of vocational expertise	283	29%
Social and Communication skills	278	29%
Learning to take initiative	180	19%
English language	159	17%
Environmental / green skills	146	15%
Physical and manual skills, e.g. dexterity	132	14%
Literacy skills	58	6%
Numeracy skills	47	5%
Foreign languages (other than English)	46	5%
Don't know	54	6%
Other	11	1%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: Multiple answers allowed

The main reasons for changes described above included the changing requirements and demands of employers (61%), changes in national curricula (58%), or because of general societal changes (42%) (see Table 4). The changing interest and preferences of learners influenced the content of the VET delivered in 27% of cases, while organisational constraints (e.g. financial cuts, lack of staff, etc.) influenced change in 20% of them. For 14% of vocational schools, the changes experienced over the past 10 years in the content of the VET reflected increased levels of autonomy obtained by them.

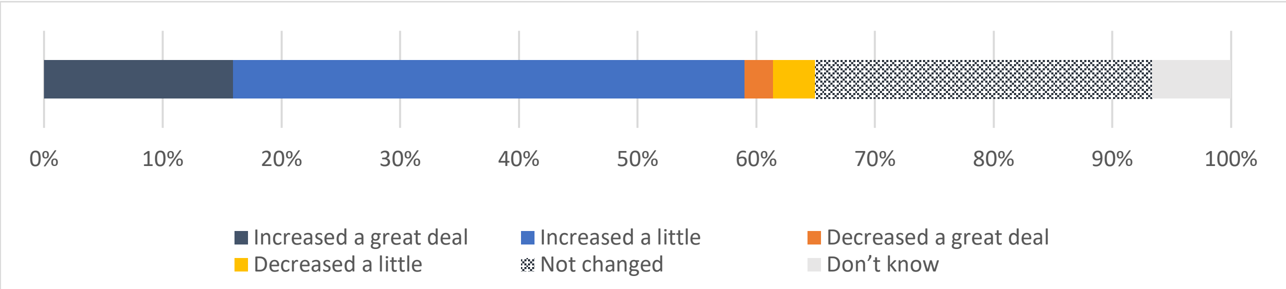
Table 4: Main reasons for the changes in the content of VET

Changes in the content of VET:	No. of respondents	%
Respond to changing requirements and demands of employers	582	61%
Were mainly prescribed by the national curriculum	561	58%
Reflect general societal changes (e.g. being more environmentally aware)	406	42%
Mainly follow the interests and preferences of our learners	258	27%
Are due to organisational constraints (e.g. financial cuts, lack of staff, etc.)	196	20%
Indicate greater autonomy of our institution to decide how VET is delivered	136	14%
Are due to other reasons	40	4%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: Multiple answers allowed

According to the respondents, the majority of vocational schools had increased – either a little or a great deal – their influence over the content of the VET. Only in a few cases (6%) had their influence decreased (see Figure 9). A significant share of vocational schools had not experienced any changes (28%).

Figure 9: Changes in the influence of the institutions on the content of the VET they deliver over the past 10 years

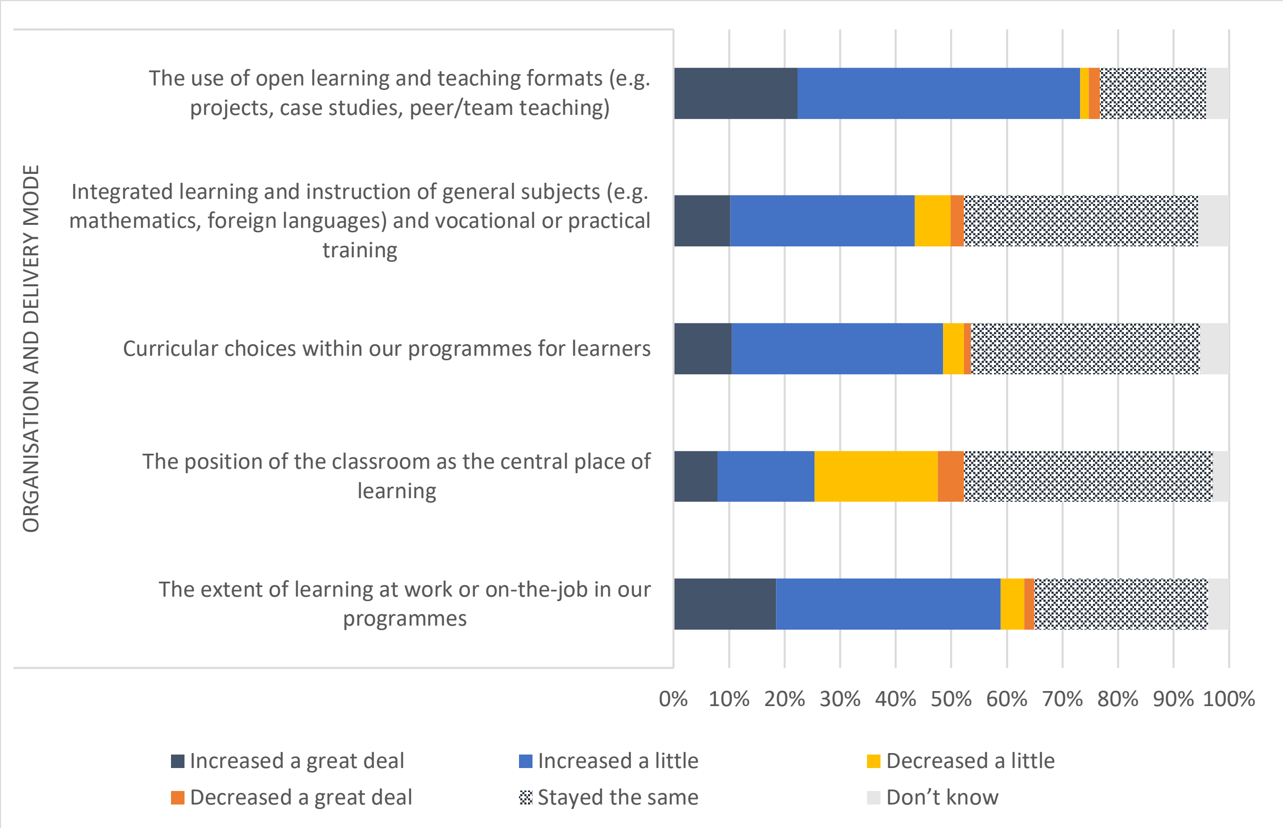


Source: Cedefop Future of VET Survey of Vocational Schools

4.2 Organisation and delivery mode

Over the past 10 years, changes were also observed in the organisation and means of training delivery experienced in vocational schools (see Figure 10). These changes included an increase in the use of open learning and teaching formats (73% of vocational schools in the survey). In most cases (59%), vocational schools had increased on-the-job components in their programmes. Only a quarter of vocational schools observed an increase in the importance of the classroom as the central place of learning. In most cases its importance either decreased (27%) or remained unchanged (45%).

Figure 10: Changes in the organisation and delivery mode of VET over the past 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

The changes in the content and the delivery of the VET had numerous impacts on vocational schools as shown in Table 5 below. The changes mostly affected the personnel of the institutions. For most vocational schools (63%), changes affected the role and/or the tasks performed by teachers and trainers. 27% of the vocational schools invested in the continuous training of teachers/trainers, while 20% recruited teachers/trainers with new skill sets. The overall number of teachers changed in 16% of cases. In a few cases (6%), non-teaching staff were recruited. In 39% of cases there was investment in new equipment for teachers and trainers.

Changes also affected the variety of programmes or qualifications offered by 29% of vocational schools, and the way assessments were conducted in 20% of them. No significant changes were experienced in funding (7%). Other results included changes in the amount face-to-face modules, the decreasing number of students completing a course, lowering course standards, and decreasing the number of staff employed.

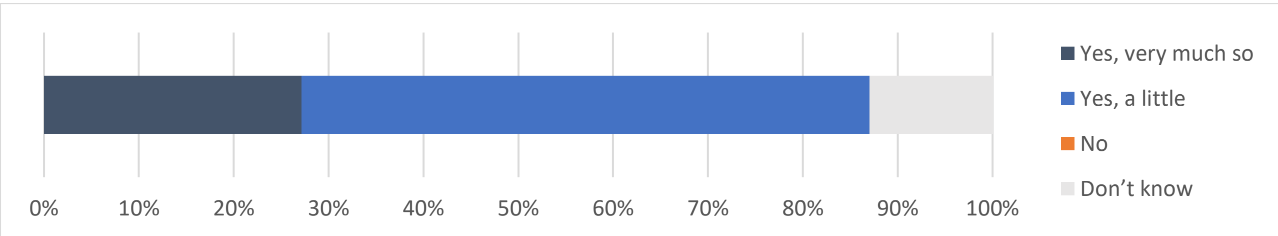
Table 5: Results of the changes observed in the delivery and content of VET over the past 10 years

Results of changes over the last 10 years for the institution:	No. of respondents	%
New roles or tasks for teachers/trainers (e.g. organising training places, counselling)	601	63
Investments (excluding routine replacement) in new equipment / machinery for teaching purposes	372	39
Changes in the variety of programmes or qualifications on offer	282	29
Changes in the investments in the continuing training of teachers/trainers	263	27
Recruitment of teachers/trainers with new skill sets	198	21
Changes in the way assessments are conducted	191	20
Changes in the overall number of teachers/trainers	158	16
Changes in the way the institution is funded	65	7
Recruitment of non-teaching staff (e.g. business managers, etc.)	61	6
Other	25	3

Source: Cedefop Future of VET Survey of Vocational Schools *Note: multiple answers allowed*

Overall, 65% of the respondents declared that their institutions had influence over the changes that had occurred in content and delivery. A quarter said they had no influence over the changes introduced. The remaining 10% did not know, as shown in Figure 11 below.

Figure 11: Overall influence of the institutions over the changes introduced in the content and delivery of VET

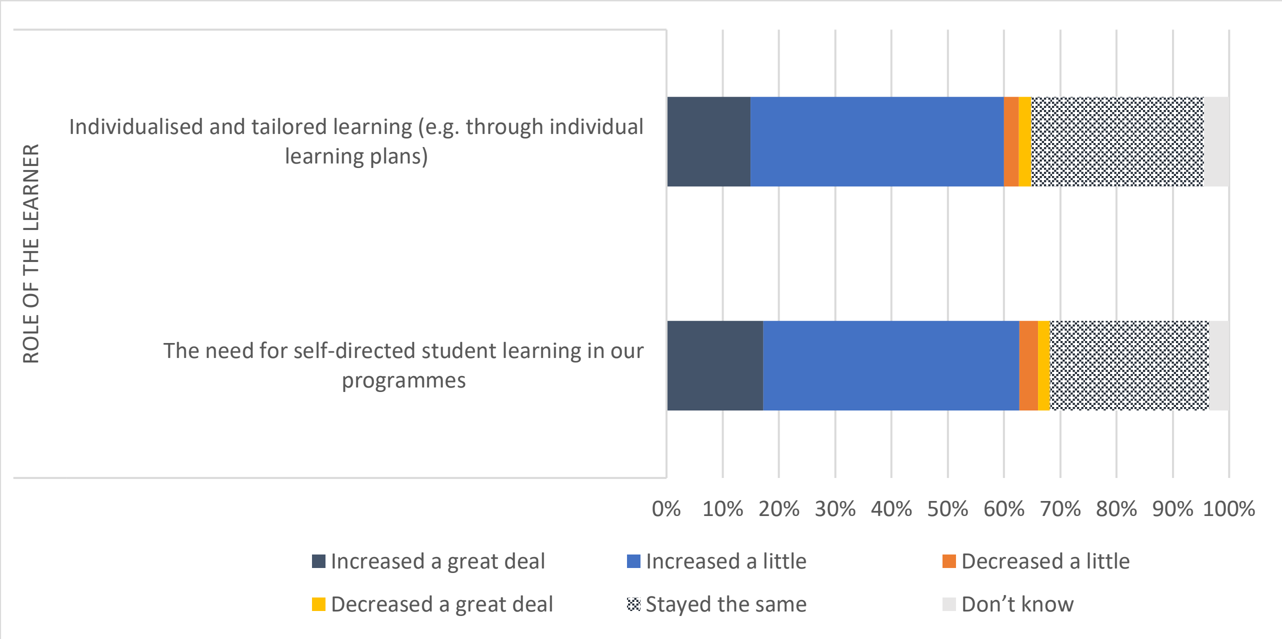


Source: Cedefop Future of VET Survey of Vocational Schools

4.3 Role of the learner

Over the past 10 years, changes have occurred which affect the role of the learner. In the VET programmes offered in over 60% of cases, tailored learning plans and self-directed student learning are increasingly important (see Figure 12).

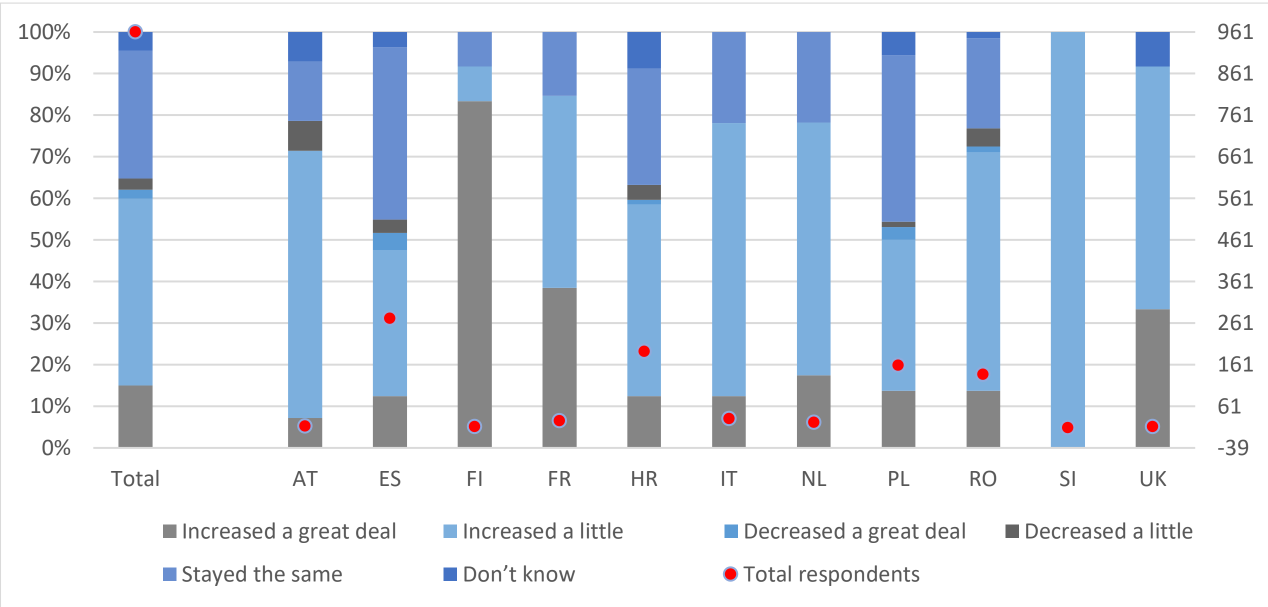
Figure 12: Changes observed over the past 10 years in the role of the learner



Source: Cedefop Future of VET Survey of Vocational Schools

There is a country dimension to the findings presented above. For example, FI stands out with respect to relatively strong increase in the take-up of individualised and tailored learning, reported in 83% of vocational schools (see Figure 13)

Figure 13: Changes observed in the individualised and tailored training by country



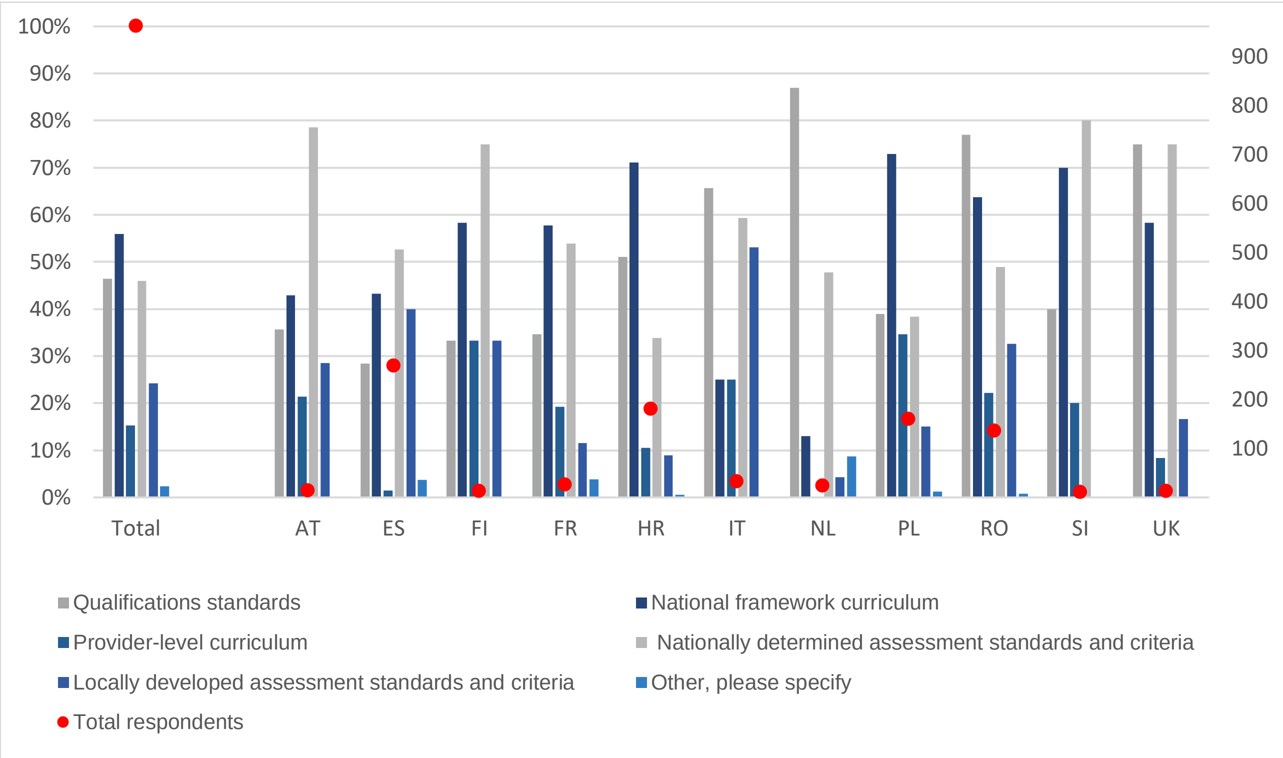
Source: Cedefop Future of VET Survey of Vocational Schools

CHAPTER 5.

Assessment of VET students

Most vocational schools (56%) currently used national framework curricula as a basis to assess the award of qualification of learners in their institutions, while just under half of the respondents used qualification standards and/or nationally-determined assessment standards as a basis (46% in each case). Fewer institutions made use of locally developed assessment standards (24%) and provider level curricula (15%). As shown in Figure 14 below there were differences by country. For example, locally developed standards were are mostly used by vocational institutions in IT (53%), and by those based in FI, RO, and ES (just over 30% in each country). The incidence of provider-level curricula was especially evident in vocational schools based in PL (35%) and FI (33%). HR, PL and SI stand out because of the high share of institutions that made use of national framework curricula (71% on average), while NL and the UK for their use of qualifications standards (81% on average).

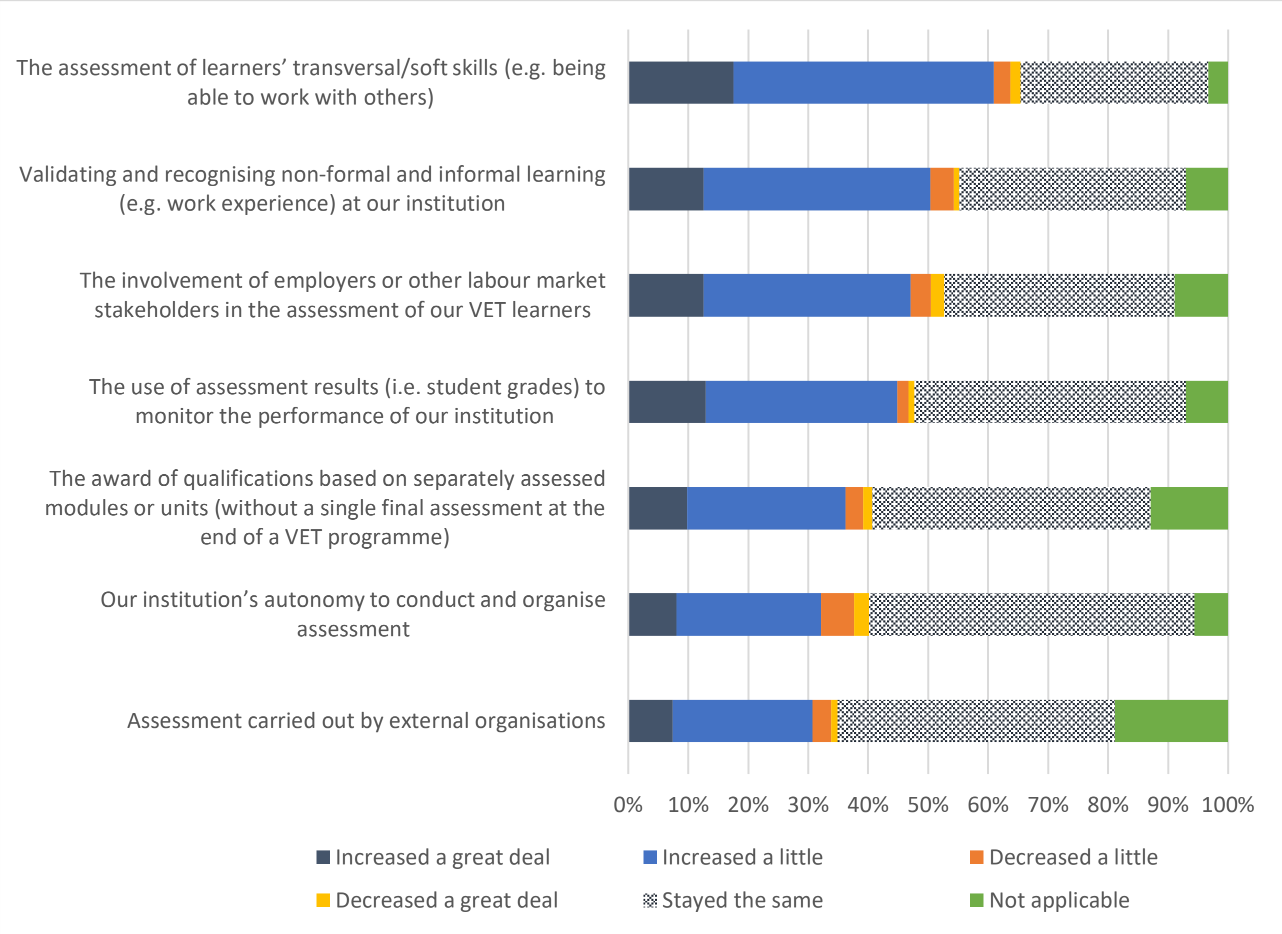
Figure 14: Basis/reference point for assessment leading to the award of a qualification



Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed / Note: 22 respondents (2% of the total) answered “Don’t know” and are not included in the figure

Over the past 10 years, the role of assessment had changed in most of the vocational schools participating in the survey. The share of those reporting that assessment remained unchanged was substantial, especially in relation to assessment carried out by external organisations (46%), and the autonomy of institutions (54%), as shown in Figure 15 below.

Figure 15: Changes in the role of assessment over the last 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

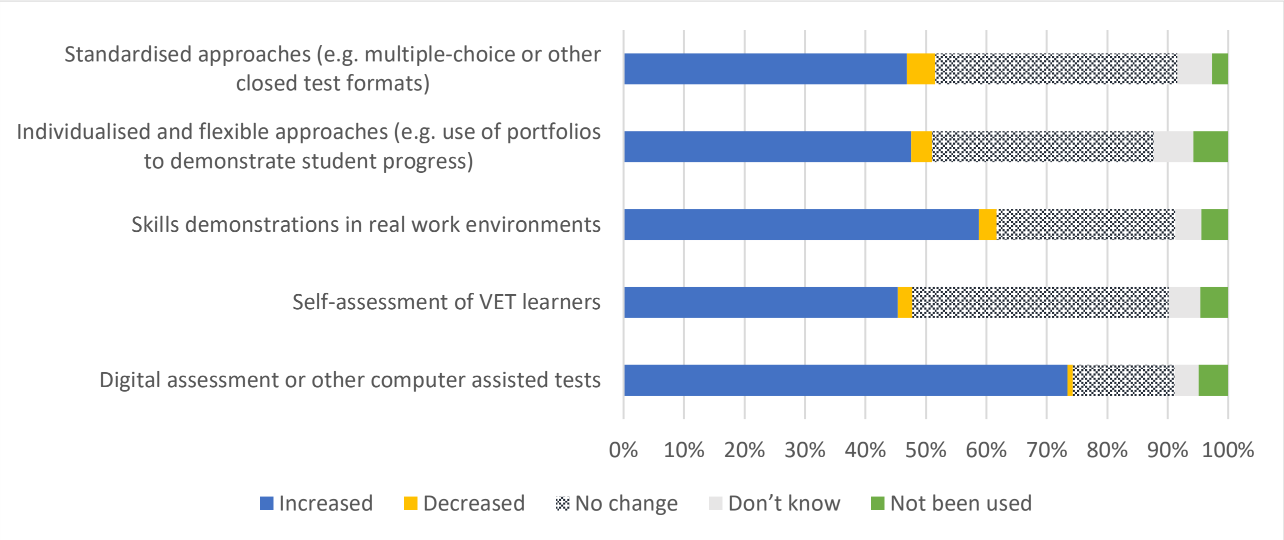
There had been an increase in the assessment of learners' transversal skills and by the validation and recognition of informal learning; respectively, reported in 61% and 50% of cases respectively. A significant number of vocational schools reported no change in the assessment of transversal skills (31%) or assessment of informal learning (38%). The involvement of employers in the assessment of learners increased in just under half of cases (47%) (it remained unchanged for 38% of them). Similarly, 45% of vocational schools had made increasing use of assessment results (i.e. student grades) to monitor the performance of their institutions. The same share of respondents had not experienced any changes. A large share of vocational schools in the survey reported no changes in the role of separately-assessed modules or in the assessment carried out by external organisations to award a qualification (46% for each option).

The overall autonomy of institutions to conduct and organise assessments had not changed for over a half of vocational schools (54%), while it had increased for 32% of them, and decreased for 8%.

Overall, vocational schools used a mix of practices to assess learners . Vocational schools responding to the survey used two or more methods to assess learners in their institutions.[4] Only a residual number of respondents did not use any of the practices listed (4% on average).

Over the past 10 years, most vocational schools had used an increasing variety of assessment methods. This was especially the case in the use of digital assessment or other computer-assisted tests (see Figure 16). This was evident in 73% of cases. Similarly, 59% of vocational schools had increased their use of skills demonstrations in real work environments as a form of assessment of their VET programmes. A similar share – 47% on average – had increasingly used self-assessment, individualised and flexible approaches, and standardised approaches. An average of 40% of respondents had not changed their use of these practices.

Figure 16: Changes in the use of practice used to assess learners during the learning process in VET programmes



Source: Cedefop Future of VET Survey of Vocational Schools

[4] A single method of assessment is used only by 3 institutions.

CHAPTER 6.

Cooperation and competition in delivering VET

6.1 Cooperation with other organisations

Over the past 10 years, most institutions have co-operated with other organisations to deliver VET programmes as summarised in Table 6. In most cases, cooperation was with local/regional employers (70% of cases), and other educational institutions (63%). Over 40% of the respondents' institutions had worked with universities and local/regional governments. Cooperation with employers and sectoral organisations was less frequent – respectively, 36% and 22% of the total responses – while even fewer institutions (14%) delivered VET programmes together with trade unions.

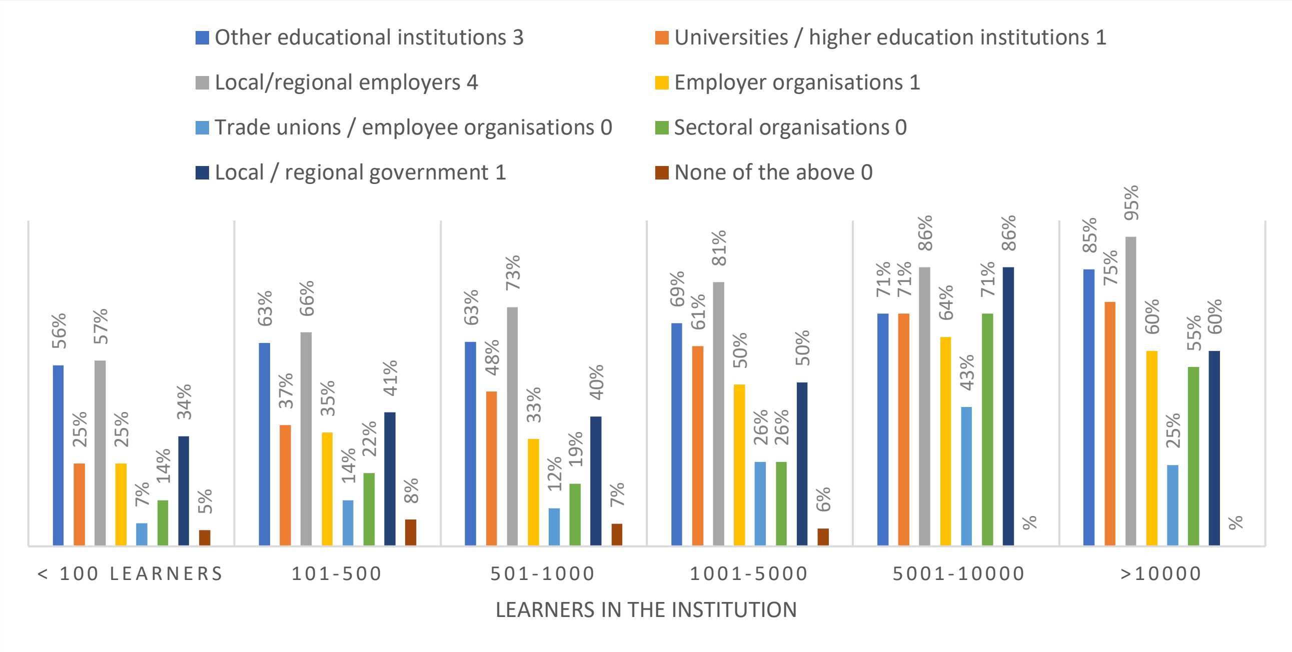
Table 6: Cooperation of institutions to deliver VET programmes

Cooperation with:	No. of respondents	%
Local/regional employers	671	70%
Other educational institutions	605	63%
Universities / higher education institutions	414	43%
Local / regional government	402	42%
Employer organisations	343	36%
Sectoral organisations	211	22%
Trade unions / employee organisations	139	14%
None of the above	64	7%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed

The size of the institution generally influenced the number of organisations with which they cooperated. As shown in Figure 17 below, while smaller vocational schools (i.e. with less than 100 learners) cooperated with a restricted number of actors – mainly universities and other educational institutions – larger vocational schools interacted with multiple actors. On average, 68% of the respondents in vocational schools with 1000 or more learners cooperated with each of the organisations listed in Table 6. Some differences wre also observed: for example, vocational schools in NL, FR, UK and SI cooperated with sectoral organisations more than respondents from other countries (on average 57% of them in these countries compared with 22% in the other ones).

Figure 17: Cooperation of institutions to deliver VET programmes by number of learners

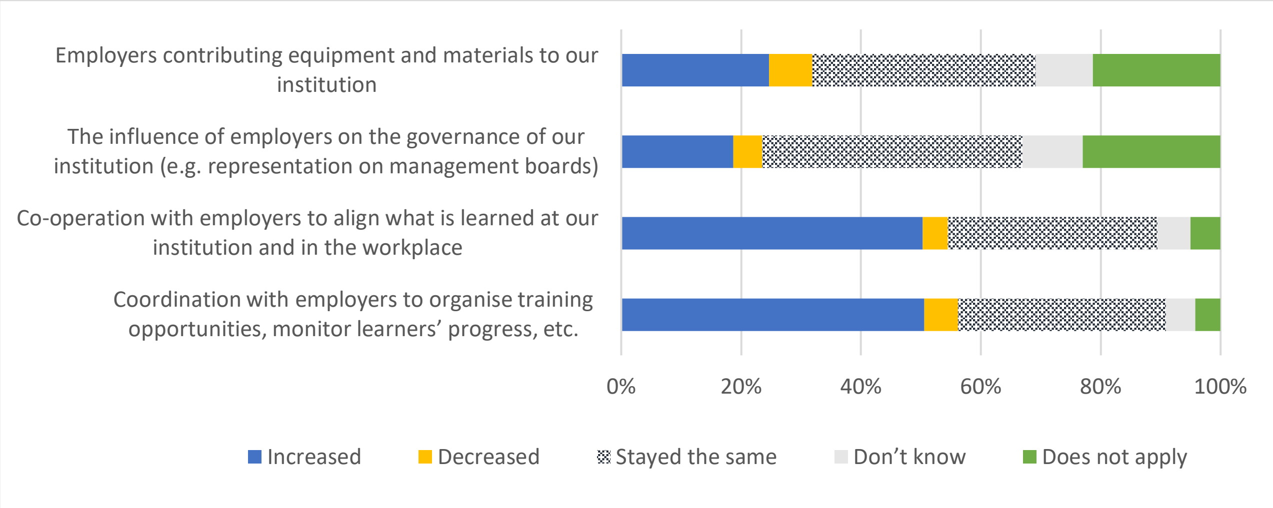


Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed / Note: five respondents did not provide information on the number of learners in their institutions and are excluded from the analysis.

Overall, the coordination with employers had increased in half of the institutions in order to organise training opportunities and monitor learner progress. The cooperation to align the content of learning also increased in 50% of the cases. For each option 35% of the respondents had not experienced any change.

The influence of employers on the governance of the institutions changed modestly – it increased in 19% of cases and decreased in 10% of them. A around a fifth of vocational schools in the survey said that employers had no influence in their institutions (23%) nor provided equipment and materials (21%). Larger vocational schools with between 5000 and10000 learners were the exception, as employers provided an increasing amount of equipment and materials in over half of them.

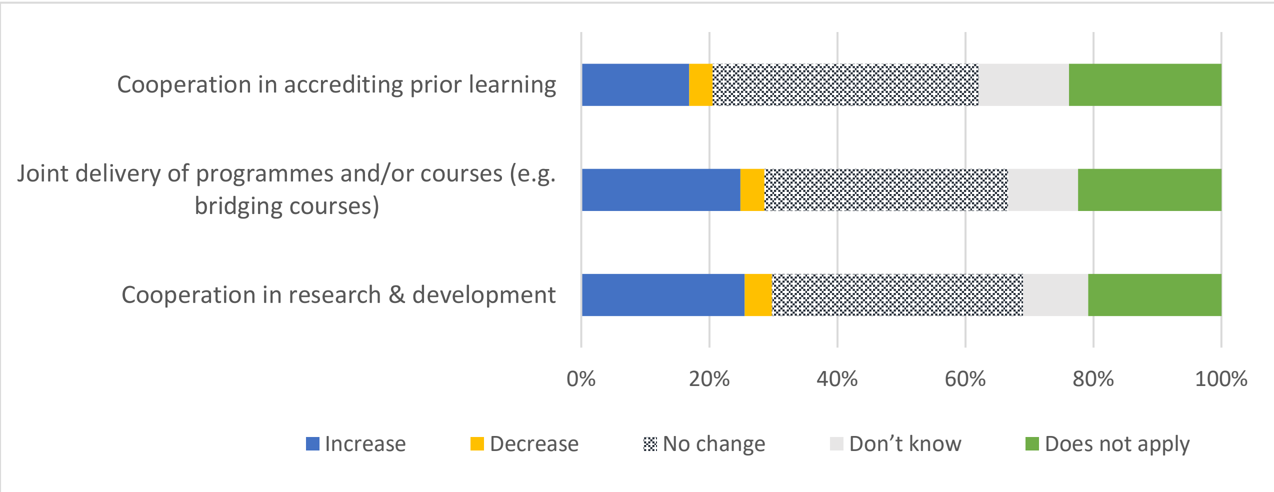
Figure 18: Changes observed in the cooperation with employers over the past 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

Vocational schools reported that their cooperation with higher education institutions had generally not changed much over the past 10 years in many instances (reported in 40% of cases). A quarter, however, said that they increasingly worked with higher education institutions on research & development and joint delivery of programmes (see Figure 19).

Figure 19: Changes observed in the cooperation with higher education institutions over the past 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

According to the respondents, the changes experienced in the cooperation with different actors were linked to the overall need to increase the labour market/employer relevance (68%) and the attractiveness of their VET programmes (54%) – see Table 7 below. Fewer respondents linked the changes with evolving national curricula (36%), the increasing need to assist learners in progress to study at higher levels (21%), access to equipment on which to train (18%), or ICT applications that made cooperation easier (13%).

Table 7: Reason for changes in cooperation with external organisations

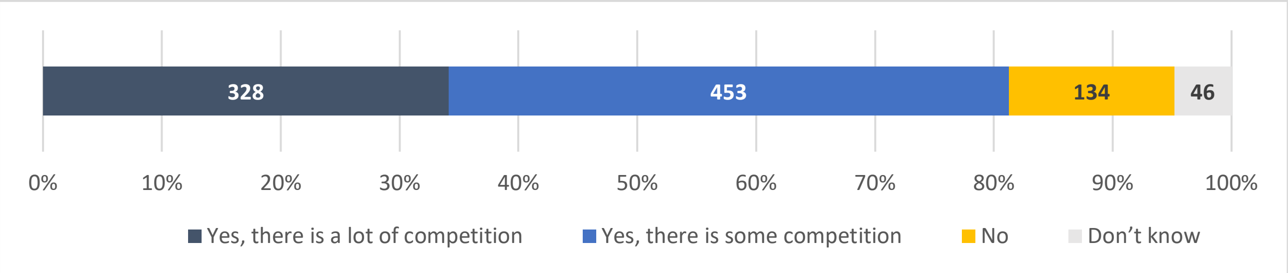
Cooperation has changed because…	No.of responses	%
VET programmes need to be more labour market / employer relevant	654	68%
The attractiveness of VET programmes needed to increase	521	54%
The national curriculum requires more cooperation with other organisations	350	36%
To assist learners progress to study at higher levels	200	21%
To access equipment on which to train	172	18%
Made increasingly easy through ICT applications	125	13%
Financial reasons (e.g. need to share premises)	87	9%
Need to share VET teachers across institutions	87	9%
Other	33	3%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed (at most three3)

6.2 Competition from other organisations

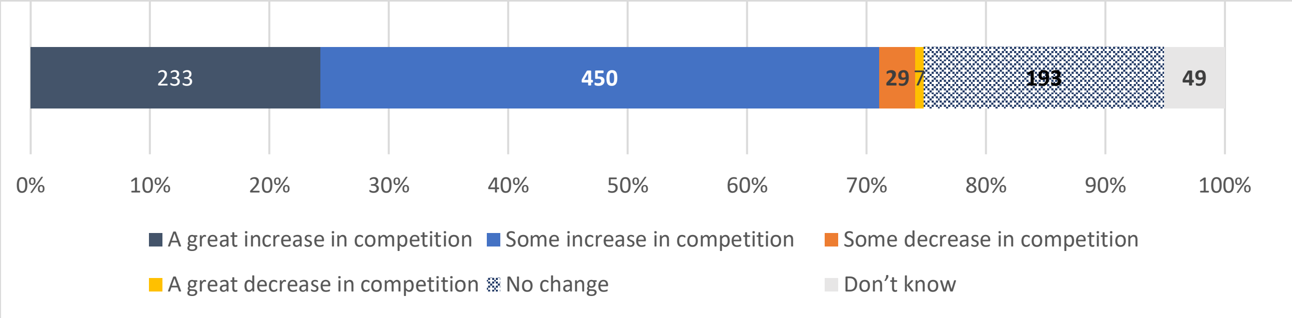
As shown in Figure 20, competition from other schools/training institutions to enrol learners had been experienced by most vocational schools, to high extent (34%) or to some extent (47%). Additionally, in the majority of cases (71%), vocational schools believe the competition from school/training institutions has increased over the past 10 years (see Figure 21). Responses are quite uniform across the Member States.

Figure 20: Competition faced by respondent institutions from other schools/training institutions to enrol learners over the last 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

Figure 21: Changes in the competition to enrol learners over the last 10 years

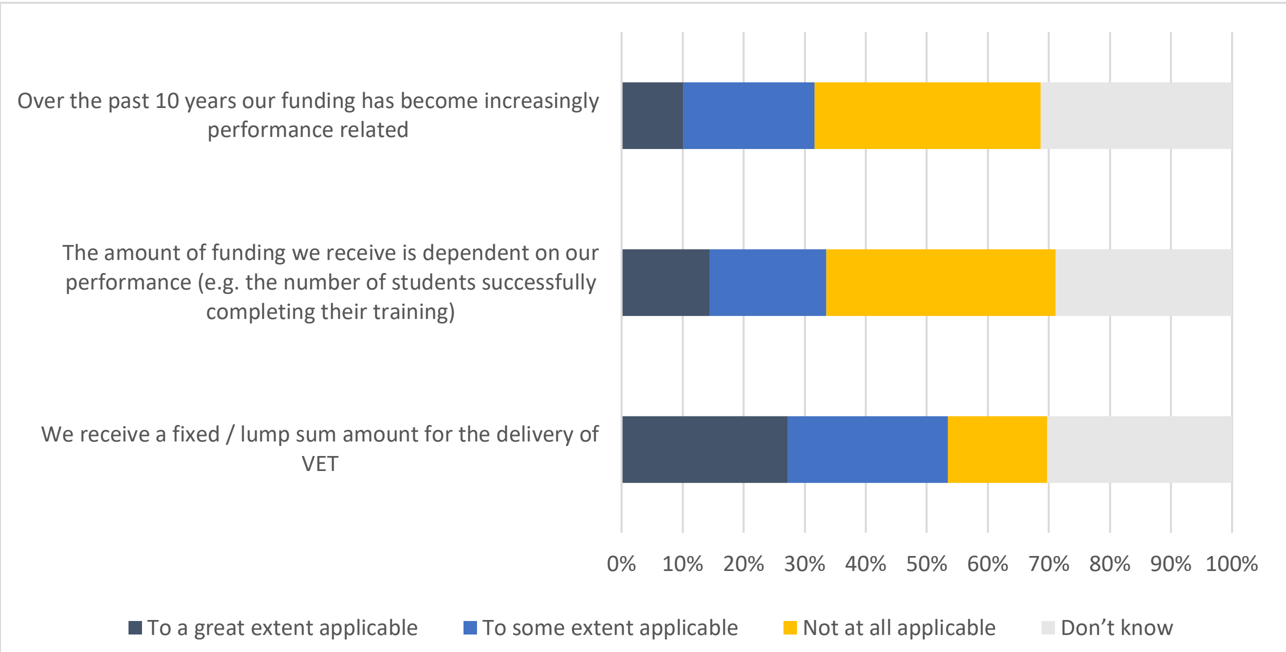


Source: Cedefop Future of VET Survey of Vocational Schools

6.3 Changes in the conditions attached to funding

Overall, 37% of vocational schools said that their funding had not become increasingly performance related (see Figure 22). Just over 30% of the respondents said that the funding their institution received was performance-related, and/or has this type of funding increased. Many institutions said they received (to some or to a great extent) lump-sum amounts to deliver VET (53%).

Figure 22: Changes in the conditions attached to funding

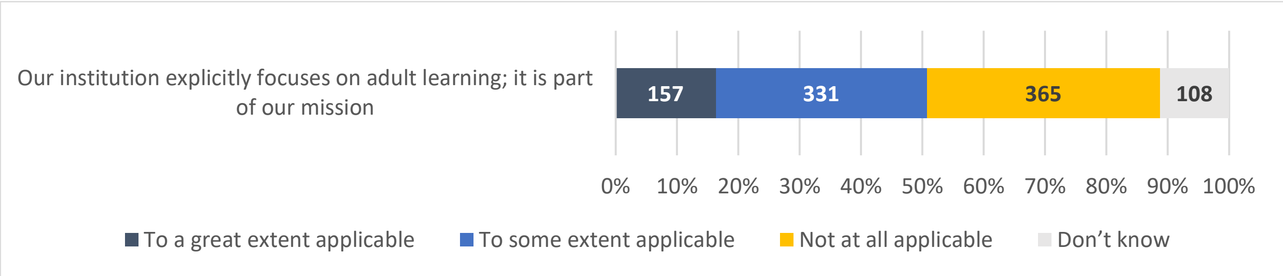


Source: Cedefop Future of VET Survey of Vocational Schools

CHAPTER 7.
Continuing VET delivered to adults

Providing continuing VET to adults was an important focus in about half of the institutions participating in the survey, with 16% of vocational schools responding reporting that they agreed to a great extent that their institution explicitly targeted adults, with 34% saying they agreed to some extent (see Figure 23). In contrast, 38% of vocational schools said that they did not target adults learners engaged in continuing VET.

Figure 23: Percentage of vocational schools targeting adult learners



Source: Cedefop Future of VET Survey of Vocational Schools

The various type of adult learning delivered by vocational schools is summarised in Table 8. It shows that just under two thirds of vocational schools delivered VET leading to a qualification. Just under a third of vocational schools delivered no training to adult learners (29%).

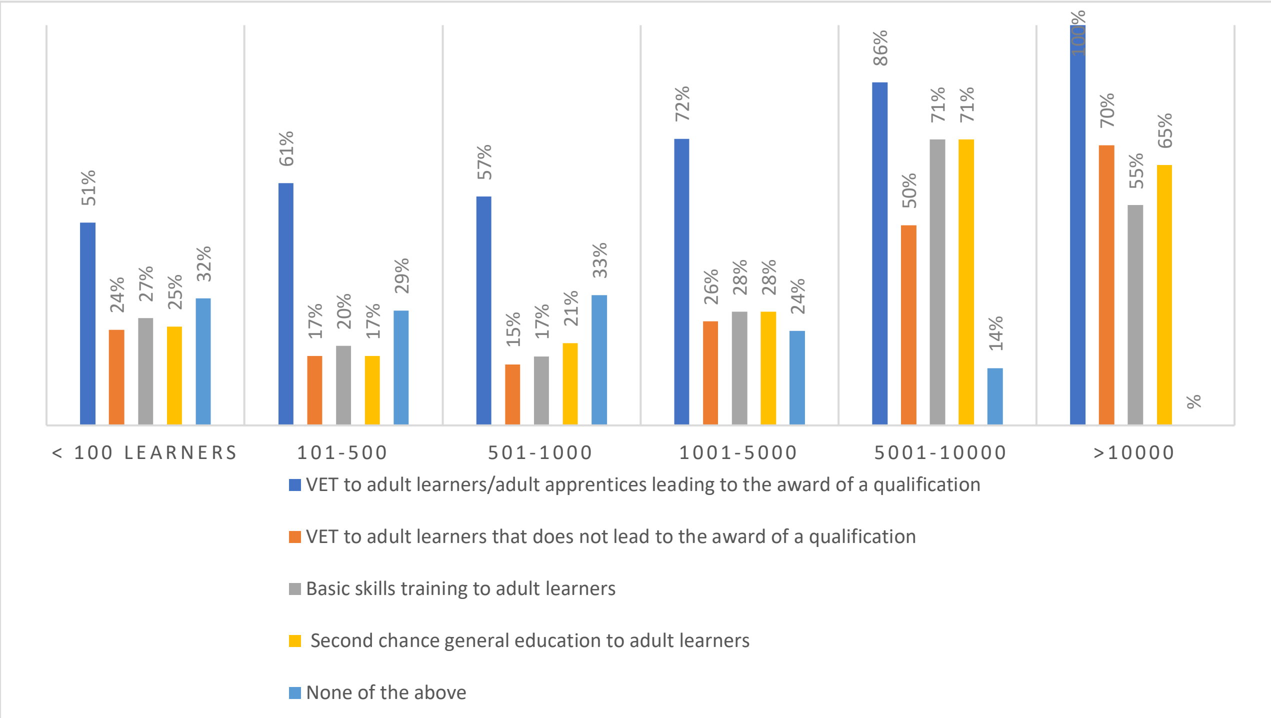
Table 8: Types of training delivered to adult learners

The institutions provide…	No. of respondents	%
VET to adult learners / adult apprentices leading to the award of a qualification	584	61
VET to adult learners that does not lead to the award of a qualification	197	20
Basic skills training to adult learners	220	23
Second chance general education to adult learners (i.e. to those who may have failed to obtain qualifications / skills when they were young)	219	23
None of the above	276	29

Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed

The size of the institution influences the variety of VET offered to adults, as shown in Figure 24. Large vocational schools with over 5000 learners offered a wide range of VET to adults, while smaller organisations focused on one type of VET – usually the one leading to the award of a qualification. The share of institutions not delivering any of the types of training listed in Table 8 decreases as the size of the institution increases.

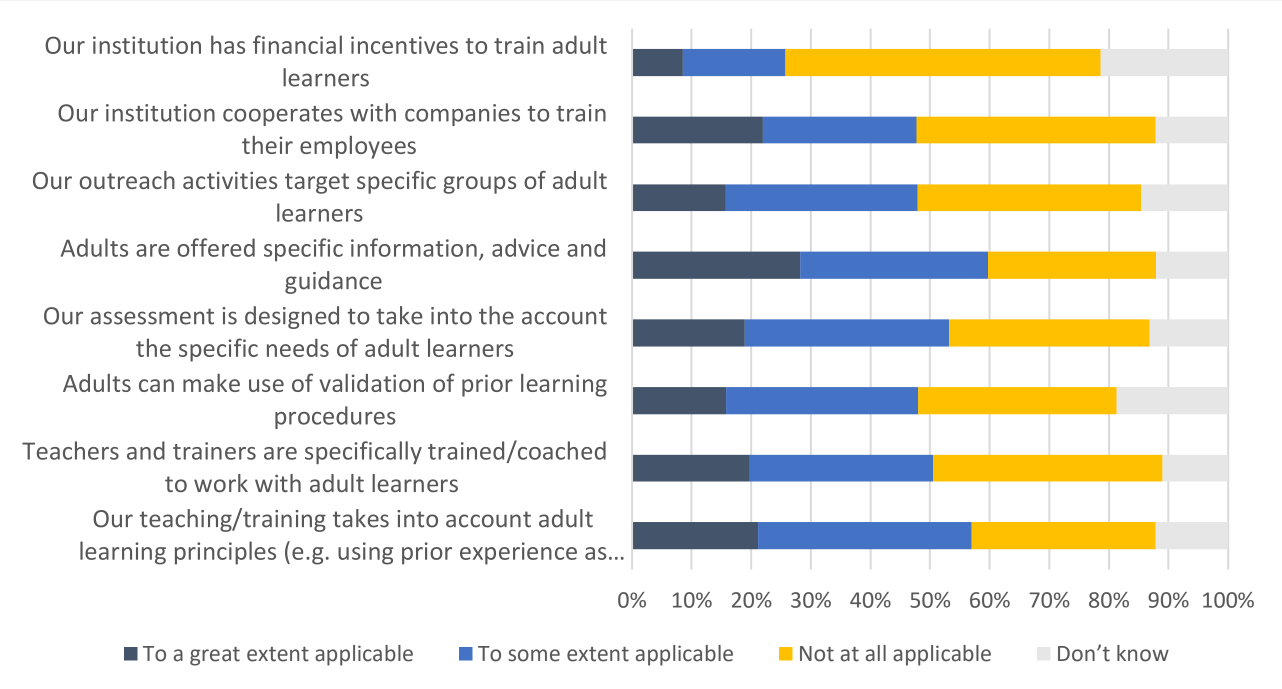
Figure 24: Type of training delivered to adult learners (by size of the institution)



Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed / Note: five respondents did not provide information on the number of learners in their institutions and are excluded from the analysis.

As shown Figure 25, vocational schools targeted adults learners in different ways. For example, most institutions used - to a great extent or to some extent - assessments designed to take into account the specific needs of adult learners (63%), and often use prior learning validation (48%). Half (50%) involved teachers and/or trainers who were specifically trained to work with adult learners, and 57% of them took into account adult learning principles. Most institutions (60%) provided specific information, advice and guidance to adult learners. Cooperation with companies to train their employees was also common (48%). Only a small number of respondents (26%) received financial incentives to train adults, while the majority (53%) did not. In 37% of cases no use was made of the various options listed in Figure 25.

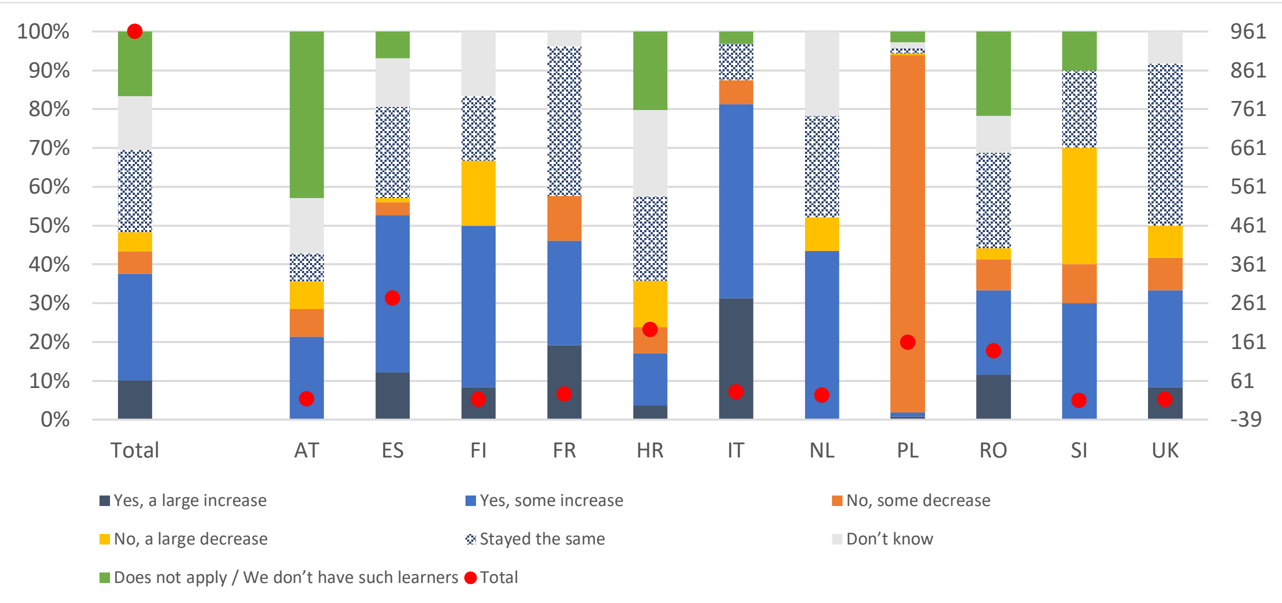
Figure 25: Means used by attract adult learners



Source: Cedefop Future of VET Survey of Vocational Schools

Almost half of vocational schools had experienced changes in the number of adults learners – employed or out-of-work – at their institutions over the past 10 years (Figure 26 below). More specifically, the majority experienced an increase (10% and a large increase and 27% a small one), while 11% experienced a decrease. The number of adults employed or out-of-work remained constant in 21% of cases. This share was higher in the UK, ES, RO, NL, FR.

Figure 26: Changes in the number of adult learners who are in employment or out-of-work over the past 10 years



Source: Cedefop Future of VET Survey of Vocational Schools

The reason most commonly provided for the reasons behind the change in the number of adult learners – as shown in Table 9 - was simply the large demand for this type of training from learners (mentioned by 73% of vocational schools),[5] followed by the responsibility of the institution to satisfy skill needs (34%), and the opportunity to use of programmes for young people to train adult learners (25%). Another reason was the increasing number of unemployed adults and reduced job opportunities. Where the number of adult learners had deceased this was said to result from a fall in demand from learners and a lack of funding (selected by 50% and 33% of the respondents respectively).[6]

Table 9: Reasons behind the changes in the number of adult learners

Reason for the change:	No. of respondents	%
Increase	Total: 361	
There is a large demand for this type of training from learners	263	73%
It is an additional source of income for our institution	56	16%
We can use our programmes to train young people to train adults	90	25%
It is the responsibility of the institution to satisfy skill needs of all kinds in the local regional area	123	34%
We were approached / funded to do so by public agencies	55	15%
We were approached / funded to do so by employers	52	14%
Other	15	4%
Decrease	Total:103	
A lack of demand from learners	51	50%
A lack of funding available for this type of education and training	34	33%
Our institution decided to focus on other areas of training	19	18%
A lack of facilities to deliver this type of training	6	6%
Other	13	13%

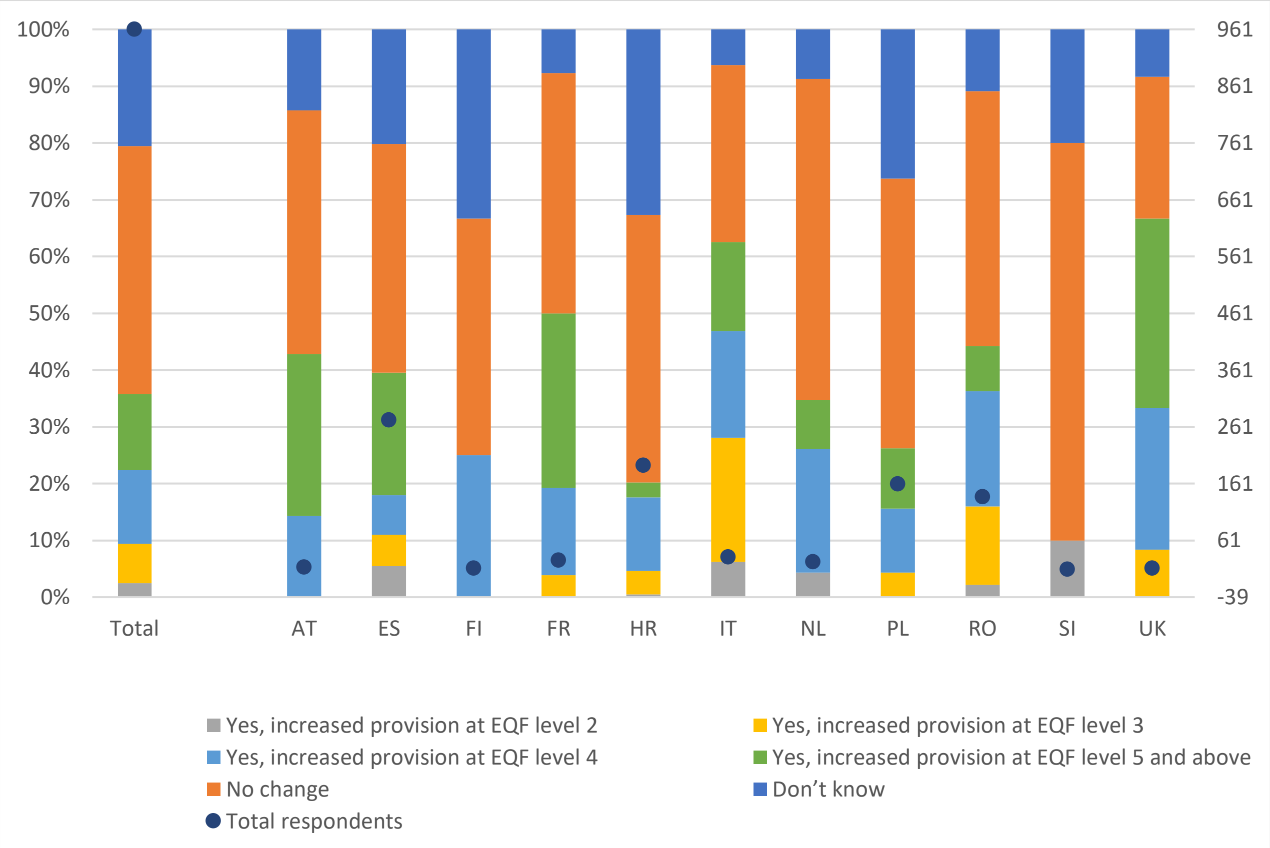
Source: Cedefop Future of VET Survey of Vocational Schools / Note: Only respondents experiencing an increase/decrease provided an answer to the question, 361 and 103 respectively

[5] Percentages in the following paragraph are calculated on a total of 361 respondents, i.e. these experiencing an increase in the number of adult learners employed or out of the work.
[6] Percentages in the following paragraph are calculated on a total of 103 respondents, i.e. these experiencing a decrease in the number of adult learners employed or out of the work.

CHAPTER 8.
VET at higher levels

Whereas VET at one point in time was primarily associated with education at the upper secondary level it is now increasingly delivered at higher levels (EQF level 5 and above). The survey of vocational schools reveals that many had increased provision at higher levels (see Figure 27). There appears to be substantial variation by country with FR and UK recording relatively large shares of vocational schools increasing provision at EQF level 5 and above, and countries such as NL and FI recording no or negligible levels of increase.

Figure 27: Changes in the qualification level by country



Source: Cedefop Future of VET Survey of Vocational Schools

Among the vocational schools which experienced an increase in the VET at post-secondary or higher education levels, the vast majority were motivated to do so because of an increase in the demand from learners (80%).[7] Other reasons mentioned included the increasing demand from employers (41%), and the increasing opportunity to provide VET learners with a progression route to higher education (41%). Other motivations – i.e. new programmes increasingly available at this level, national government encouraging this development, local/regional authorities encouraging this

[7] Percentage is calculated on a total of 129 respondents, i.e. these experiencing an increased provision at EQF level 5 and above.

development – accounted for roughly a quarter of all those vocational schools reporting an increase in VET at higher levels (see Table 10). A much smaller number of vocational schools (6%) were motivated to do due funding becoming available to train people at higher levels.

Table 10: Motivation and impacts of the increase in the provision of VET at EQF level 5 or above

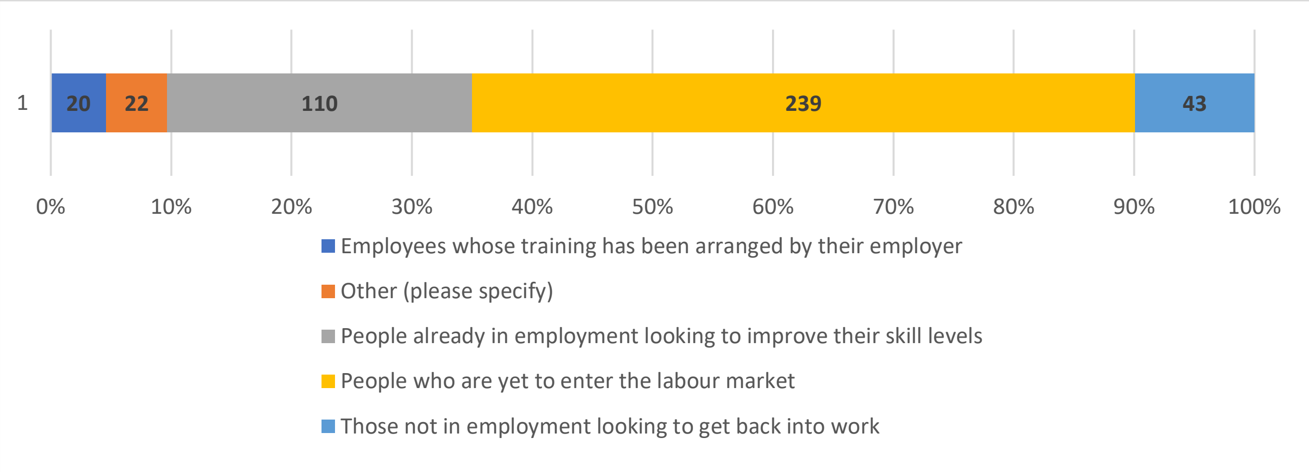
Motivation for the increase:	No. of respondent	%
Increasing demand from learners for VET at this level	103	80%
Increased demand from employers to provide VET at this level	53	41%
New programmes increasingly available at this level	37	29%
Opportunity to provide VET learners with a progression to higher education	53	41%
National government encouraging this development	31	24%
Local/regional authorities encouraging this development	32	25%
Funding became available to train people at this level	8	6%
Other	2	2%
Impacts of the increase:		
VET learners' progression opportunities	68	53%
Recruitment of additional teachers / trainers	49	38%
Improved the status of the institution with the local community and economy	47	36%
Improvement of skills of existing teachers/trainers	44	34%
Led to more cooperation with higher education institutions	31	24%
Redirected investments to higher level training	24	19%
Less provision at lower levels	16	12%
Other	2	2%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: multiple answers allowed / Note: the question was addressed to 129 respondents, i.e. those experiencing an increase

An increase in VET provision at higher levels was said to increase learners' progression opportunities (53%). It had also required vocational school to recruit additional teachers/trainers (38%), improve the skills of existing teachers/trainers (34%), or redirect investments to higher-level training (19%). The result was to decrease provision at lower levels in some instances (12% of vocational schools recording an increase in provision at higher levels). Where provision at higher levels had increased, it was said to improve the status of the vocational school within the local community and economy. It also resulted in increased cooperation with higher education institutions.

Respondents provided information about the labour market status of VET learners at higher levels(i.e. at EQF level 5 and above). The majority (55%),[8] were individuals who were yet to enter the labour market, while 25% were employed but looking to improve their skill levels (see Figure 28). Relatively few learners were unemployed looking to get back into work (10%), or employees whose training had been arranged by their employer (5%).

Figure 28: Profile of VET learners at EQF levels 5 and above



Source: Cedefop Future of VET Survey of Vocational Schools / Note: all vocational schools providing higher level VET courses and programmes - 434 respondents

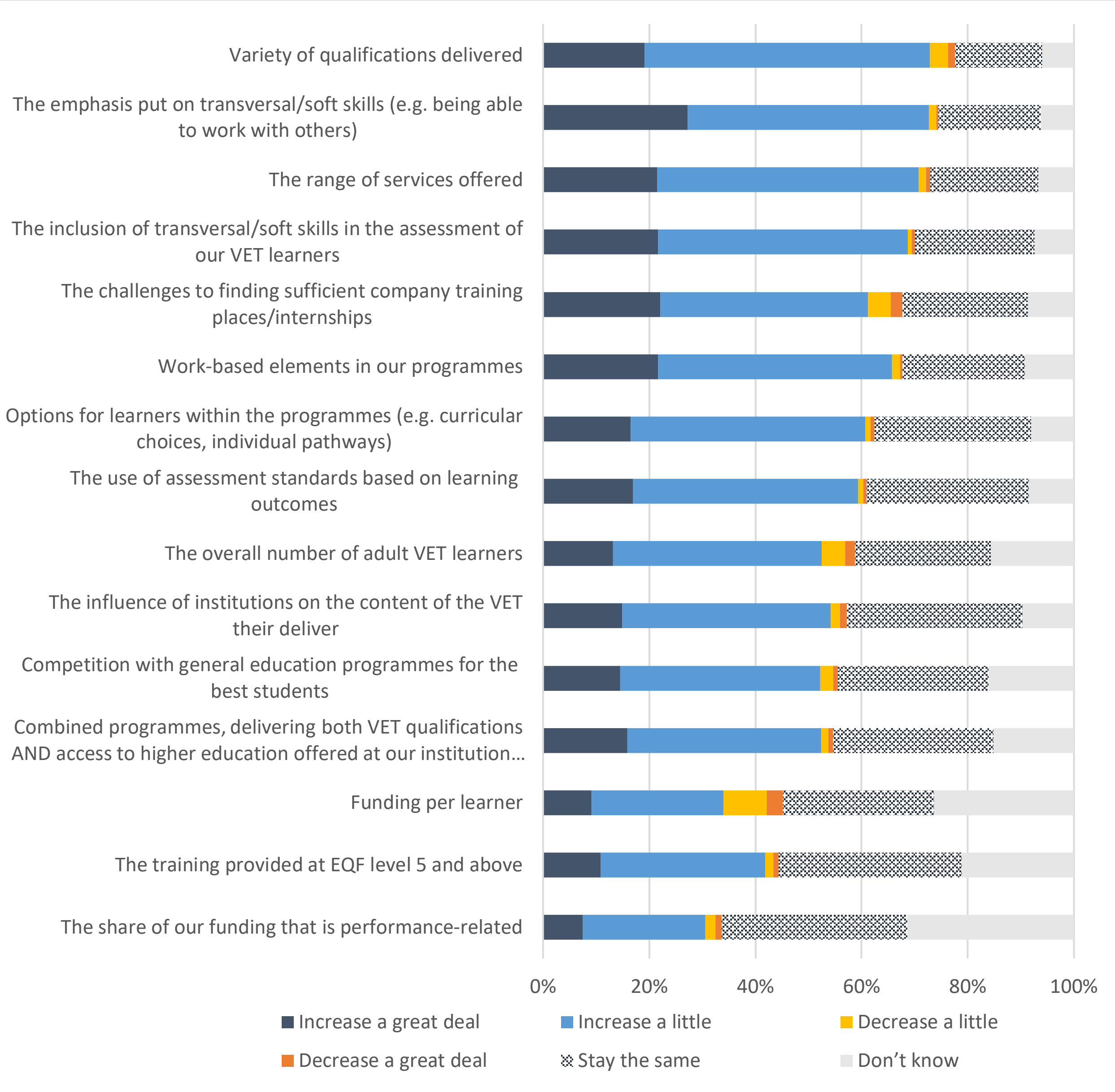
VET provision at EQF level 5 and above was oriented towards a wide range of sectors including: aeronautical; agriculture; animation; automotive; beauty; construction; creativity; data; energy; engineering; environment; health; hospitality; ICT; industrial; IT; landscape; management; marketing; mechanics; media; services; technical; telecommunications; textile; tourism; and trade.

[8] The percentage is calculated on a total of 434 respondents. 527 respondents have not selected any of the options suggesting they do not deliver VET at EQF level 5.

CHAPTER 9.
The future of VET

Respondents were asked to reflect on the changes they expected to see over the next 10 years (see Figure 29). The most commonly expected changes - foreseen by at least 70% of vocational schools - were expected in the variety of qualifications and the range of services offered, more of an emphasis on transversal and soft skills in their programmes, and changes to the assessment of VET learners. On the other hand, less than half of the respondents expected changes in the share of their funding that was performance-related (44%), or the provision of training provided at EQF level 5 and above (34%).

Figure 29: Expectations for the next 10 years

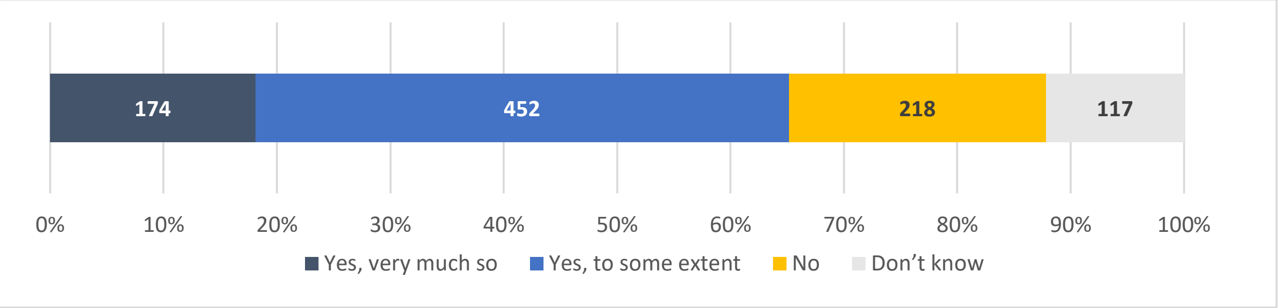


Source: Cedefop Future of VET Survey of Vocational Schools

With regard to the content of VET, work-based provision was expected to increase (reported by 66% of vocational schools), as well as providing learners with (more) optional elements in the programes they delivered (61%). Half of the respondents thought that their influence over the content of the VET was likely to continue to increase over the next 10 years. There were likely to be challenges over the next 10 years. For example, in terms of finding sufficient company training places/internships (61%), or being able to cope with increased levels of competition between vocational schools (52%).

The survey also investigated whether COVID-19 was likely to have a longer term impact of VET (see Figure 30). Most of vocational schools were of the view that COVID-19 was likely to impact upon their provision to a large (18%) or to some extent (47%). Just under a quarter (23%) of respondents did not believe the pandemic would have an impact over the longer term. The vast majority of respondents from SI, NL, IT, FI, and AT expected COVID-19 to have a long term impact (70% or above).

Figure 30: Respondents views on whether COVID-19 will have a long-term impact on the development of VET



Source: Cedefop Future of VET Survey of Vocational Schools

Among those respondents expecting a longer-term impact, 48% expected a loss of employment in key sectors they served (see Table 11). Just over a third (36%) expected that the longer-term impact would be an increase in employment in jobs/sectors where VET is likely to be in higher demand. Around a quarter of vocational schools (24%) expected any lack of demand for training from employers resulting from COVID-19 to disappear over the short-term.

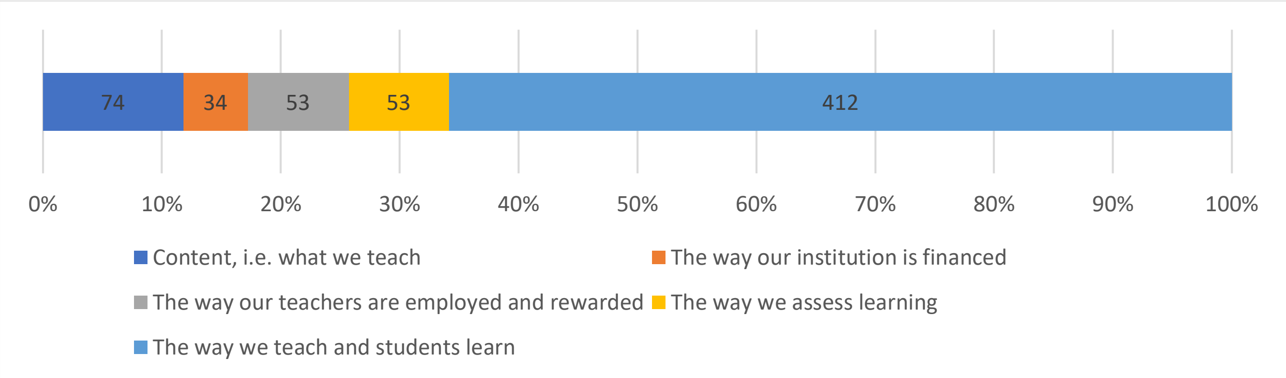
Table 11: Reason provided for the long-term impact of COVID-19 pandemic

Reason given:	No. of respondents	%
Loss of employment in key sectors and jobs we serve	298	48%
Increase of employment in jobs/sectors where VET will be in higher demand (e.g. health care and health and safety)	226	36%
Cutbacks in public expenditure on VET	176	28%
Lack of demand for training by employers	153	24%
The economy and labour market will recover quickly after COVID-19	152	24%
Other	41	7%

Source: Cedefop Future of VET Survey of Vocational Schools / Note: all expecting a longer-term impact from COVID (626 respondents) / Note: multiple answers allowed

The type change likely to be ushered in as a consequence of the longer-term impact of COVID-19 – see Figure 31 - was that of changes in the way courses are taught (66% of vocational schools where COVID-19 was expected to have a long-term impact).[9] Changes included more use being made of distance learning.

Figure 31: Sustainable changes expected at the institutional level



Source: Cedefop Future of VET Survey of Vocational Schools / Note: all expecting a longer-term impact from COVID (626 respondents) / Note: multiple answers allowed

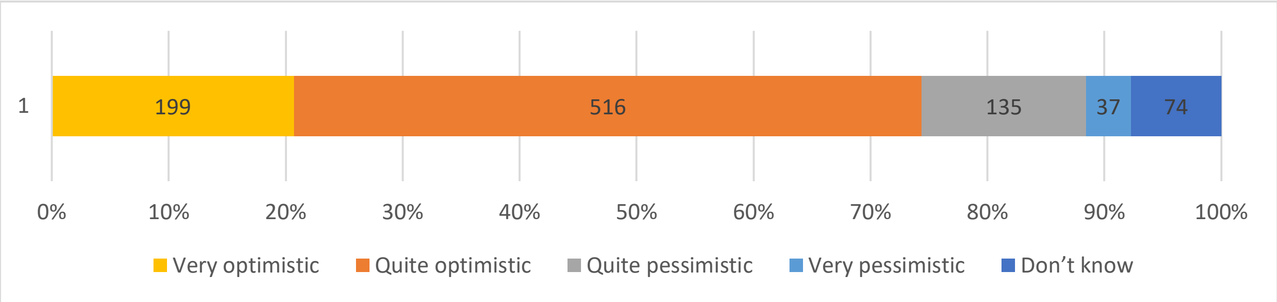
Most respondents (74%) were optimistic that VET will continue to provide high-quality training in the future, while only 18% of them are pessimistic. In HR, FI, FR, PL, and ES respondents tended to be more pessimistic (see Figure 32). The reasons for optimism included:

- the overall demand for VET trained personnel is expected to increase;
- improvements in the quality of provision;
- increased cooperation between institutions especially at the local labour market level;

[9] Percentages in the following paragraph are calculated on a total of 626 respondents, i.e. those expecting a longer-term impact on their institutions due to COVID-19 pandemic.

- better qualified and skilled VET teachers / trainers;
- learners / students having a more positive perception of VET;
- the importance attached to VET by policy makers;
- increased funding.

Figure 32: Optimism/pessimism that VET will provide high quality training in the future



Where respondents were pessimistic it was because of fears that a lack of teachers, outdated curricula, a lack of cooperation and networked solutions, a poor view of VET from would-be students, funding decreases, and an ageing society (potentially reducing their pool of learners) would all work work against VET provision. As noted above, the optimists outnumbered the pessimists.

CHAPTER 10.

Conclusions

The findings from Cedefop's Future of VET Survey of Vocational Schools provide a fascinating insight into the role of education and training providers in delivering VET. Even the most cursory reading of the findings from the survey reveals the way in which vocational schools have readily adapted their provision to meet the changing demands of learners, employers, and policy makers over the recent past. It needs to be borne in mind that the changes to which vocational schools have had to adapt their provision are sometimes formidable. They include:

- technological changes which have affected the structure of demand (the loss of employment in sectors on which some VET providers are dependent replaced by employment gains and resulting skill needs in new areas of economic activity which vocational schools need to find the resources to serve);
- finding often scarce resources which allows VET institutions to adapt in practice, such as have a sufficient cadre of suitably qualified and experienced teachers and trainers who can deliver the new skills required in the labour market. At the same time, vocational schools need to gaini access to the new technologies – which are sometimes expensive to acquire - on which leaners need to gain experience and competence;
- expanding provision in the face of demographic change which has, and will continue to reduce the size of the pools from which vocational schools have traditionally recruited learners. In turn this has increased competition between providers in some instances. The response has been to expand provision into new areas, such as adult learning and VET at higher levels;
- making VET attractive to would-be learners and employers given that it often lacks parity of esteem with general education.

The evidence suggests that many vocational schools have succeeed in addressing these challenges as evidenced in the optimisitic views expressed about the future of VET. Respondents had every expectation that VET would thrive into the future in part because it had faced down the challenges of the last 10 years or so (from the financial crisis in 2008 to the COVID-19 pandemic of 2020/21) and, in doing so, had contributed to national VET systems becoming more responsive to the needs of learners and employers and, in aggregate the needs of economy and society. At least that was the view of the vocational schools which responded to the survey and which had, by and large, successfully navigated a number of disruptions to their expected direction of travel over the recent past.

If there is one key message to emerge from the survey of vocational schools it is that of resilience. The resilience of vocational schools to adapt to whatever changes they are required to respond stemming either from the external environment (such as technological and demograpic change), or from within VET systems (as they undergo periodic reform). That resilience, at least for the time being, is dependent upon co-operation between a range of labour market actors – and other providers – to deliver high quality VET. This is perhaps most acutely observed in the increasing importance vocational schools attached to providing workplace based learning (such as apprenticeships) where employers and VET providers need to work hand-in-hand. Resilience is expected to be a defînding feature of VET in the future. In part, because the types of skill demands that are increasingly likely to arise ove the next 10 years or so are ones that are seen to favour the types of provision delivered by vocational schools.