Study
of Human Capital
in Poland

2011

Report from a survey of training firms and institutions, supplemented with the results of studies of general population and employers conducted in 2010 as part of Study of Human Capital in Poland

Who educates us when the school is over?

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HUMAN CAPITAL
NATIONAL COHESION STRATEGY

PARP

JAGIELLONIAN UNIVERSITY IN KRAKOW

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1. Introduction

We hereby present an initial review of the results acquired in the first round of the study which is part of the Study of Human Capital project conducted by the Polish Agency for Enterprise Development (PARP) in partnership with the Jagiellonian University to the people responsible for planning human capital development policies, and all groups and individuals interested in the current situation in the supply and demand of competences on the Polish labour market. The data was collected by Millward Brown SMG/KRC. The study is aimed primarily at the diagnosis of the demand for employees with specific competences and the availability of these competences on the labour market, among both people who have already completed their education and those who are still in education yet are coming to the end of a significant stage of it: upper secondary school or first or second-stage degree education. These are the results of the first round of the study (of the planned five), which will allow a snapshot to be taken of not only the state but also the trends concerning the supply and demand for human capital.

Many economists and development strategists have warned that Poland will gradually exhaust its growth potential, resulting on the one hand from an improvement in the allocation of resources thanks to the operation of market mechanisms, and on the other from the increase in productivity of the capital and labour, thanks to the benefits of technology import, appropriate for the period of catching up with highly developed economies. The availability of employees with qualifications sufficient to absorb technology is one of the conditions for making good use of the catch-up period. At the same time, if our country is to move on to the following phase of development based not only on technology absorption, but also on technology development, changes will have to take place in many dimensions of the economy, society, and operation of the state. It is important that there is an increasing number of firms whose decision-making centres and research and development centres are situated in Poland. One of the conditions for such a scenario to take place is the availability of well-prepared managerial and engineering staff, but also executives furnished with competences necessary for the functioning of an innovative enterprise. Regulatory and fiscal order should assist in the commercialisation of inventions, which still poses a problem. If the development begins to follow such a scenario, we should perceive that by observing a trend in the demand for staff competences. This is why a study that will allow such a trend to be followed is worth embarking on.

Waiting for innovation-based development cannot turn into waiting for Godot, which is a threat should the economy not be able to move fluently between the phases of development, providing this passage with the resources developed in the economy of the catch-up phase. Moreover, even if the developmental processes of the new type can be triggered, a large part of the economy will be based on the traditional model, and will require – besides other conditions – also an appropriate supply of human resources. This is an argument that proves that it is worthwhile to conduct, besides foresight-type studies, diagnostic ones identifying the current tensions and the deficits in competences in the labour market.

The studies whose results we present here are intended to provide information useful for decision making. The organs of public administration which have at their disposal public funds are expected to conduct a suitable educational policy, or, more broadly, one that will develop human capital. The accuracy of public policies beyond doubt depends on the capacity to create adequate provisions of development, and skill in understanding the challenges, and yet it is also determined by the availability of information that allows problems to be identified, their scope to be defined, and concepts to be formulated for solutions to them. At this stage of the project, we quite naturally have at our disposal only a large-scale diagnosis of the status quo. With the subsequent stages being conducted, opportunities for identifying the changes will also arise.

The Study of Human Capital in Poland is a project conceived at the Polish Agency for Enterprise Develop-

ment (PARP) that reacts to the deficit of information experienced while working on the planned support for the enterprise sector in the development of human resources, using funds from the European Social Fund as part of the Human Capital Operational Programme. Having conducted the pilot initial version of the concept of the study, PARP invited the team of the Centre for Evaluation and Analysis of Public Policies at the Jagiellonian University (CEiAPP), closely related (also personally) to the Department of the Sociology of Economy, Education and Research Methods of the Jagiellonian University – to participate as a partner in the project. From the very beginning, the study was planned as a multi-aspect review of the demand and supply of competences in the labour market repeated in the five successive years. The study is composed of the following modules, distinguished by the group that they investigate:

1. Study of employers (excluding public administration and agriculture, forestry and fisheries, as well as some other small sections, which are listed in the methodological report)
2. Study of people of working age
3. Study of students in last years of upper secondary schools
4. Study of final-year university students (first and second-stage degrees)
5. Study of unemployed people registered in County Employment Offices (PUPs)
6. Study of job offers placed in County Employment Offices and on online portals
7. Study of training firms and institutions

Based on original research, these studies are complemented with an analysis of institutional data collections, including the Educational Information System (SIO) and information collected by the Central Statistical Office (GUS) from reports on tertiary education (S-10). Detailed information concerning the size of the samples and the data collection methods is provided in the methodology report and in individual thematic reports.

The above list proves that a universal study was successfully conducted on the factors decisive in the situation of human capital in Poland. It was carried out on very large samples that allow a multitude of analyses, also at the level of regions (voivodeships). In this respect, it is definitely a unique study.

During the concept work and consultations, and also during the successive tests, a set of research tools was developed. Such a set is always a compromise between the list of questions to which an answer is sought and the possibility of execution: one cannot conduct a study, going beyond the obligations set forth in acts of law, in which the length of the questionnaire would result in a refusal on the part of the respondent. For this reason we realise that, while some readers may be disappointed by the fact that we did not ask certain questions that we would like to know the answers to, we can say in advance that here we are united in our unsatisfied curiosity. We selected the questions primarily on the grounds of recognition of the information needs of the parties planning to use the results of these studies for construction of more effective public interventions in development of human capital resources in Poland. The proper rhythm of these studies will also be adjusted to the needs of these parties: they will take place at the end of the first and beginning of the second quarter, so that the results can be provided by the end of June, and the final report by September, thus allowing it to be used for planning purposes. Exceptionally, the first round of the study was conducted from the end of August to December 2010. The second round is currently being conducted.

The first set of reports that we are supplying to all interested parties are thematic reports that contain summaries of the individual modules. They are a review of the results achieved and provide information about the scope of the information acquired. Moreover, they contain what we hope to be plenty of interesting observations concerning the groups studied. Quite naturally, general reports must remain at a certain level of generality. Interested readers will be able to generate more detailed listings on their own, using an application that will be made available on the project website.

We count on the fact that both the general reports made available and the synthetic report integrating the results of the studies in individual modules for the sake of the balance of competences in the Polish labour market will provide important data helpful in the planning of operations in the scope of supporting the development of human capital in Poland. We believe that it will also be useful for enterprises – in the scope of planning the development of human resources in firms, and for the sector of training firms – for shaping the range of services offered. We perceive its potential in terms of shaping education policy towards the unemployed, even though representative studies of the registered unemployed encounter substantial difficulties. This project is complementary for the other studies in the area, including those conducted by the Educational Research Institute, whose common objective is quality improvement of actions in the field of lifelong education, from early childhood to the late mature age. These actions are one of the strategic development challenges for Poland. To say, quoting Andrzej Frycz-Modrzewski, that the future Republics will be just like the education of their youths, does not go far enough. Because that "education" should now concern not only youth, but also adults. Yet are we, as a society, ready for that?

2. Main conclusions

2.1. Description of training firms and institutions

- The studies conducted show that the market for training services is highly diverse and fragmented. The sector of training firms and institutions is dominated by small and micro operators, who account for 85% of the sample studied. Only 13% are medium-size enterprises employing – in any form of employment – from 50 to 249 of staff, and only 2% a large institutions – with employment exceeding 250 people.
- Training firms and institutions are relatively new businesses: every other one has been in the market shorter than eight years. Relatively long experience can be boasted by driving schools, vocational training centres (ODZ), practical training centres (CKP), lifelong learning centres (CKU), language schools, and units of institutions of higher education.
- The volume of turnover is a sensitive question for training firms and institutions, for which reason over 60% of the businesses did not provide any relevant information. Among those who did, the turnover of every other business in the sector in 2009 was below PLN200,000, and of the remaining 50% – above. The average turnover was highest among the vocational training centres, and in training and consulting businesses, and lowest – among driving schools.

2.2. Services of training firms and institutions

- As far as the proposed forms of education go the services of the firms and institutions surveyed are varied: a decided majority of the respondents offer three or more forms of education, and nearly one in every three – two forms of education, and only just over 10% – one form.
- The most popular form of education, offered by more than 9 out of 10 businesses surveyed, are courses. Second in popularity comes training, third – consulting, followed by seminars and conferences. Least frequent among the services offered are coaching and e-learning.
- Most often present in the range of services offered by the training firms and institutions are courses and training related to motoring, and maintenance and repair of motor vehicles, especially courses required for awarding various categories of driving licences. Second in frequency are subjects related to personal development and improvement of general competencies, and third – subjects related to broad canvas of IT, construction and industry, safety at work, fire protection, and first aid.
- Should we exclude mandatory (e.g. safety at work, fire protection) and basic (which allow to obtain category A and B driving licences) courses and training, the subjects present most frequently among the ones offered by training firms and institutions are personal development and development of general competencies, questions related to motoring and obtaining licences to sampling frame vehicles and devices with the exclusion of the category A and B driving licences, IT and computer skills, medicine, psychology, social work, construction and industry, law, enterprise management, trade, sales and customer care, foreign languages, services (hairdressing, cosmetology, tailoring, floristics etc.), Human resource management, and areas of education, training, and teacher training.
- The subjects most popular in 2010 included motoring (licences for driving vehicles), teaching of foreign languages, IT, safety at work, first aid, fire protection, and subjects from the area of extensively construed construction and industry. What, however, must be considered the most popular subjects of courses and training – after the exclusion of the mandatory courses and training and those allowing to obtain A and B category driving licences – are motoring related courses, yet related to obtaining driving licences of categories other than A and B and additional licences for drivers. Also popular is the teaching of foreign languages, computer courses and IT, subjects related to construction and industry, services and personal development, and the development of general competencies.
- Both the training plans of the training institutions and firms analysed and the estimates concerning the future demand for additional education and development prove that the representatives of the sector

do not envisage major changes as far as the thematic scope of services is concerned. Even though the majority of the surveyed training firms and institutions planned expansion of their range of services during the coming 12 months, this expansion concerns the questions that have already been present earlier in the training market. Mentioned most frequently among the subjects were questions related to the sector of personal services (hairdressing cosmetology, floristics, artistic make-up, tailoring, etc.), related to personal development and development of general competencies, with teaching foreign languages, information technologies and operating computers, preparation to obtaining driving licences, construction and industry, education, teacher training, medicine, psychology, social work, and trade, sales and customer care.

- Decisive for the thematic scope of the forms of training on offer, as the representatives of the sector declare, are primarily the focus of the firm or institution on the given field and demand for training in the given field coming from the individual clients and employers. Influencing the subject range to a lesser degree are the more extensive recognition of labour market needs, availability of the educators/trainers equipped with appropriate knowledge and skills, and also logistic considerations, including availability of appropriately furnished rooms. As declared by the respondents, they pay very little attention to the possibility of acquiring co-financing for the services they offer. Yet, considering the fact that more than every other firm and institution conducted a project financed from EFS funds, and principles of awarding these funds are present among the questions most frequently mentioned as barriers in development of training firms and institutions, this declaration should be approached with care.

2.3. Human resources in training institutions and firms

- On average, the firms and institutions surveyed employ (in various forms of employment) 20 trainers, with every other employing up to 7 such people, and the other half – more than 7 people. Fewest trainers are employed by driving licence schools, which is understandable when we take into account the fact that they are the smallest businesses of all types present in the study.
- More than 9 out of 10 trainers, instructors, and other persons providing training have higher education. Only 7% of the persons collaborating with the firms and institutions surveyed have secondary or lower education. Trainers with this level of education are mostly driving licence instructors: 51% of the driving instructors collaborating with driving schools completed secondary or lower education.
- Most representatives of training firms and institutions declared that at least one of the trainers collaborating with them has a certificate of trainer competencies. Following the declarations made by representatives of training firms and institutions, the trainers who have certificates of trainer competencies account for the largest proportion of all the trainers collaborating with the firm, especially in: training and consultancy firms, training firms, lifelong learning centres, practical learning centres, and in language schools.
- The factors that are most important while making decisions on the employment of trainers are: ethical and personal traits (honesty, reliability, responsibility), knowledge and professional experience in the field in which they train, and teaching and interpersonal skills. Important are also experience in running training, and opinions of participants of previous courses conducted by the trainer. In line with declarations, the relatively least significant are recognised name, certificates obtained, and the pay expectations of the trainers.
- The analysis of the structure of employment in training institutions included also people who provide assistance for training, being the ancillary staff of such institutions. In every other institution surveyed, there were no more than 3 people assisting in training, and the average number of this type of staff in all institutions is 7. On average, most people providing training assistance services are employed by units of institutions of higher education, with occupational education and additional education centres, lifelong education centres, and practical training centres following. Relatively smallest number of such people are employed in driving schools.

2.4. Clients of training institutions and firms

- A decided majority of training firms and institutions (65% of operators surveyed) provide services both for individual and institutional clients, 21% – only to individual clients, and 14% – only to institutional ones.
- On average, the training firms and institutions surveyed trained 595 individual clients each in 2010. Every other of them trained fewer than 240, while the other half – more than 240. The number of clients quoted most frequently was 100.
- The representatives of training firms and institutions covered by the study had on average 79 corporate clients (businesses, institutions) in 2010, with every other having up to 19 clients, and every other – more than 19. Most such clients were claimed by occupational education and additional education centres, followed by training and consulting firms, institutions of higher education, training firms, other than language schools and driving schools, centres of lifelong learning, and centres of practical learning. Closing the ranking of institutions with the highest average number of institutional clients were language schools and driving schools.

2.5. Quality supporting activities in institutions services sector

- The firms and institutions surveyed declare being engaged in a variety of actions that let them improve the quality of the services provided, and also corroborate and evaluate that quality. Moreover, no fewer than 84% of the training firms and institutions in the study stated that during the coming 12 months they intend to embark on actions serving the improvement of quality of the services provided.
- A way to corroborate the quality of the service provided is quality certificate and/or accreditation (awarded or applied for). More or less 1 in 3 training institutions and firms surveyed declared having such a quality sign awarded, while the intention to acquire a certificate or accreditation during the coming 12 months was declared by another third of the training sector representatives.
- The notions of "certificate" and "accreditation" are not always properly understood, which became obvious from the types of certificates and/or accreditation that representatives of the sector declared. Most frequently listed were ISO certificates, yet what came second was an entry to the RIS (Register of Training Institutions / Rejestr Instytucji Szkoleniowych), in fact, not being a certificate.
- More than 9 out of 10 of training firms and institutions surveyed declared that they assess the courses, training, and other pro-development actions they engage in and conduct. The training firms and institutions surveyed declare using a variety of methods of quality assessment of the activities they conduct, with the ones most frequently listed including questionnaires handed to participants after the completion of the course/activity, informal talks with participants, tests of the participants' skills, interviews with participants of courses, observation, and internal examinations.
- Most of the training institutions and firms surveyed declare that they engage in actions that serve the improvement of competencies of the training staff, and the quality of services provided by them. These activities include primarily internal training and obligation of the trainers, and educators to self-education. Used least frequently are negative sanction is that include removing a trainer/educator who fails to develop his or her skills from conducting the activities; an instrument declared by every fourth representative of the training institutions and firms surveyed.
- More than 20% of the training institutions and firms belong to a chamber, association, or partnership. Declarations of membership were most often made by representatives of driving schools, occupational education centres, institutions of higher education, training and advisory firms, lifelong education centres, and practical training centres. Most of the training firms and institutions who declare membership in a chamber, organisation, or association belong to Chambers and associations related to motoring and transport, 16% belong to the Polish Chamber of Training Firms (Polska Izba Firm Szkoleniowych), and 12% to business, trade, and economic chambers.

2.6. Development of training institutions and firms, and barriers therein

- A decided majority of the firms and institutions surveyed declare that during the coming 12 months they intend to expand their operation or engage in some pro-developmental actions. The latter include primarily actions related to the acquisition of new clients and intensification of promotion. Declared less often as a pro-developmental action is investment in assets, expansion of the territorial scope of the services provided, and increasing employment.
- Barriers in the development of the training sector are perceived by representatives of training firms and institutions primarily on behalf of public institutions, mostly those responsible for procedures binding while applying for funds from the EFS. The Act on Public Procurement promoting if not enforcing price dumping came to the absolute fore not only in the answers to the closed questions provided in the questionnaire, as it dominated also the free commentaries that participants of the study were asked for.
- Other barriers that the representatives of the sector believe to hamper the development of the training market in Poland include the lack of funds for training in businesses, low awareness of the need to invest in human resources among the employers, poor economic situation, crisis, and too small financial capital of training businesses, and lack of funds for the development of the scope of offered training.

2.7. Employer investment in human resources

- Investigating the group of enterprises covered by the employer study, one can notice that the activities related to the vocational training of the staff are more frequently undertaken by more innovative, developing, and vibrant businesses. They more often use varied instruments of vocational training for their staff, also the most advanced ones, including the development of individual human resource development plans.
- Worth emphasising is the fact that only few employers approach the improvement of professional skills of the employees in a strategic, long-term manner which is attested among others by the hiatus between the subject range of training on the one hand, and the skills and qualifications that the employers believe that their employees need.
- The largest expenditure for occupational education of staff is incurred by the smallest (with employment from 1 to 9) and largest (with 1000 and more employees) businesses. The medium-size businesses spend least.
- The largest value of expenditure was present in the case of employers from the Zachodniopomorskie, Opolskie, and Dolnośląskie regions, and lowest – by the employers from Lubuskie, Warmińsko-Mazurskie and Podkarpackie.
- The highest costs of vocational training of the staff was incurred by employers in information and communication sector, and further: finance and insurance, manufacturing, professional, scientific and technical activities, and electricity production and supply. The lowest costs were incurred by the employers in the following sectors: arts, entertainment and recreation, education, and transport.
- The smaller the number of the people employed, the higher the ratio of training availability, i.e. the percentage of the employed covered by training during the last 12 months.
- As far as the number of applied (different) instruments of occupational training is concerned, most active were the businesses operating in education, and further – administration, and human health and social work activities support. Less active were the businesses representing production and electricity production and supply, and mining and quarrying.
- There is a gap between the training needs of the businesses surveyed and the subjects of training they choose. Dominant are forms of training focused on the satisfaction of the current needs, while the employees – as employers believe – lack most occupational and the so-called "soft" competencies – individual, interpersonal, managerial, and cultural.
- Employers reveal the demand for staff who know the organisational culture of the enterprise/institution and are capable of adjusting themselves to it. This is especially well visible in the case of larger enterprises.

- The most frequent reason for not embarking on training activity – whatever the size and sector of the business – is the lack of such need associated with the assessment of staff qualifications and skills as satisfactory.
- The employers making investments in the development of human resources, far more often planned further actions in the field than the employers who have not been active in this scope in the last 12 months.

2.8. Training activity of people at working age

- Non-formal education is still hardly popular in Poland, and additionally is of selective nature mostly in respect of education, age, occupational situation and the place of residence of the potential participants of the process of gaining additional education.
- Taking into account the ratio that accounts for the 12 months before the study, only 13% of the respondents participated in training and courses during the 12 months preceding the study. Slightly more than 6% would like to continue education (i.e. participated earlier in training and would like to continue it), 7% are not planning to continue training, 13% would like to receive additional education in future, even though they have not done it so far, while a decisive majority of 74% did not participate in training and are not planning to do so in the coming 12 months.
- Distinctive features in the participation in non-formal education clearly include the place of residence (to the disadvantage of rural areas), age (the higher the age, the lower the level of participation in non--formal education), level of education (lowest in the group of people with lower secondary and lower, and basic vocational education), and occupational situation (the lowest level of training activity among the retired and pensioners).
- The unemployed obtain slightly better results than the retired and pensioners as far as training activity is concerned, moreover, they most frequently (similar to those still in education) declare a desire to learn in future. Nevertheless, only 10% of the unemployed participated in additional education during the last year, and among the unemployed registered at the employment office, the level of participation in non-formal education amounted to approximately 22%. The main reason why the unemployed did not decide to participate in training was the lack of such need, as well as lack of time and motivation, i.e. factors related more to the individual approach to learning.
- People who decided to participate in additional education for occupational reasons (mostly related to a change of occupational qualifications) in most cases plan no more education in the coming 12 months. This may among others, be an expression of the instrumental rather than autotelic treatment (i.e. a means of success of development of competencies, not only strictly connected to the work performed) of training and qualifications acquired through training. The more so as the most frequent reason for embarking on training is the desire to hone and acquire occupational qualifications, and the reason not to – lack of such need at work.
- Education in the informal system proves to be less popular than in the non-formal one. Decision to learn independently is made by less than 11% of the respondents, mostly younger people with higher education and people in education.
- Taking into account the subject range of the training conducted as well as independent learning, what comes to the fore is education in foreign languages (mostly English), which at the time is the most desired in the context of future training plans. The demand for language skills is more often acknowledged by women, people in education, and graduates of secondary and higher schools. In turn, the questions related to the personal development and general competencies – despite being one of the most frequent subjects of non-formal and informal education – are not in the lead among the desired qualifications and/or skills.

3. Training services available in Poland and the way they are used: main information about the study

This report presents primarily the results of research of training institutions and firms operating in Poland. Therefore, the report is mostly the wrap-up of the first round of the survey of training firms and institutions conducted as part of the Study of Human Capital in Poland project, and therefore we devote most attention to this range of questions. Yet to give the reader a more comprehensive opportunity to assess the position of lifelong learning in Poland, this report is supplemented with information concerning the scope and means of investing into human resources among the employers, and with the basic data concerning participation in lifelong training of adult Poles. The data come from the employer study and population study, conducted as part of the BKL Study.[1]

We believe that presenting information concerning the characteristic features of training firms and institutions and the offer of their services together with the information concerning the scale of using training and advisory services in enterprises, and also the scope of additional education received by residents of Poland in a single report allows to acquire a fuller picture of how the idea of lifelong learning is practised in Poland.

We begin with a presentation of basic information concerning the study of training firms and institutions in Poland, the goal of this study and its methodologies, to move to the description of training firms and institutions studied, presentation of the range of training and consulting services they offer, providing the data concerning the employment, number and types of clients, pro-quality activities conducted and planned, development plans, and barriers that render the development of the training market in Poland difficult. Presented in the subsequent part of the report is information concerning investment in human resources in enterprises and information on the scale and ways of obtaining additional education by people at working age.

3.1. Goals of the study

Conducted from September to December 2010, the study of training institutions and firms in Poland supplemented other research modules, conducted as part of the Study of Human Capital in Poland project. Together with the study of courses of education at levels higher than lower secondary school, it was to show what competency-forming potential is present in the Polish labour market. At the stage of designing the studies, it was believed that the study of training firms and institutions is a necessary element in diagnosing the level of development of human capital in Poland, as these are the institutions that are capable of quick and flexible adjustment of the services they offer to the changing requirements of the labour market, providing in this way an opportunity to eliminate the maladjustment between the competencies and qualifications supplied and sought.

The study of training institutions and firms had two basic objectives:

1. Basic: to ascertain the range of training available for individual and corporate (businesses, institutions, and organisations) clients, and
2. Additional: defining the potential of Polish market of training institutions and firms.

Thus defined, the goals of studies met the information needs of project recipients who pointed to the fact that despite the large significance of the training and advisory sector, the information that we have concerning it is highly limited and fragmentary.

The identification of the training services offer, of basic importance for the project, covered gathering data concerning the forms of education offered by training institutions and firms, current and planned subjects of the courses, training and other form of education available, and factors taken into account while developing the subject range of the courses. The description of the potential of training firms and institutions included a number of elements, the most important of which are gathering information concerning the human resources in the sector, number of individual and corporate clients, volume of turnover, planned development, and activities supporting quality used by the firms and institutions operating in the training market.

3.2. Study techniques, sample selection, and scientific toolkit

The survey of training institutions and firms was conducted by Millward Brown SMG/KRC with the use of CATI (Computer Assisted Telephone Interviewing) and CAWI (Computer Assisted Web Interviewing) techniques. Dominant was the CATI technique, as it was used in 97% of the interviews conducted.

1 Both the studies were conducted on random samples: the employer study covered 16,000 businesses, and the population study – 17,600 randomly selected people aged from 18 to 64.

Carrying out the study on the selected sample was preceded by the preparation of the sampling frame, i.e. a list of training firms and institutions on which the selection of the sample was based. The starting point for the sampling frame was the formulation of the operational definition of the population studied, to allow defining which businesses are to be considered as training firms and institutions. However, the precise definition of a training firm or institution was very difficult, primarily for the following reasons:

1. There are no sufficiently precise criteria that would allow and unambiguous distinction of a training firm or institution from one that provides training and/or consulting, yet only as a marginal scope of its activity.
2. Recognised definition standards are lacking, as in the studies conducted so far in the area, it was assumed that training institutions are the ones that are either registered in internal databases run by appropriate institutions (e.g., the RIS database), or the ones whose primary or secondary activity belongs to the 80.42Z Polish Classification of Activities (PKD) subclass, as it was in the case of the survey of training institutions conducted as part of the PHARE project in 2000.
3. Dispersal of training and education among the various sections of the Polish Classification of Activities (PKD). The approach finally assumed considers the following institutions and firms subjects of the study:
   a) conducting activity that in line with the Polish Classification of Activities of 2007 covers the area of lifelong teaching of adults, including the non-school forms of education in driving and piloting, non-school forms of education not classified elsewhere, and teaching of foreign languages. After consultations with the representatives of the training world, included were also the firms and institutions whose activity encompasses consulting services related to management
   b) that do not mention training and/or consulting activity as the main area of their operation, yet declare providing training services by the fact of having made entries in training sector registers and/or databases. The pertinent registers include the Register of Training Institutions (RIS), and the www.inwestycjawkadry.pl managed by PARP
   c) confirmed running training or advisory activity in the procedure of verification performed on the phone or online.

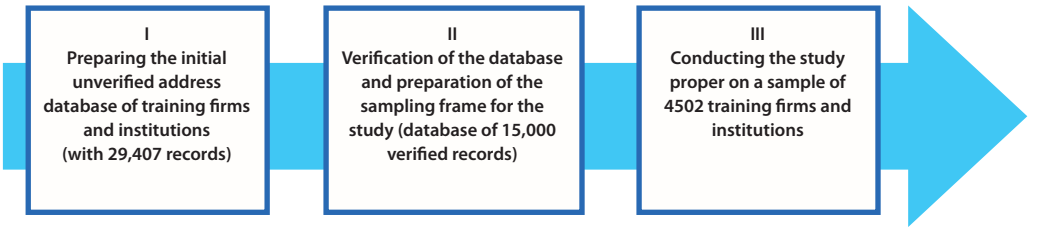
While drawing the sampling frame of training firms and institutions, the following databases were used:

- REGON,
- SIO (System Informacji Oświatowej / System of Information in Education)
- data gathered in the RIS (Register of Training Institutions / Rejestr Instytucji Szkoleniowych)
- database from the www.inwestycjawkadry.pl website
- all the other available databases and listings, including Teleadreson, HBI, ranking of institutions of higher education, proprietary database of institutions of higher education.

The three crucial stages in the procedure of preparing and conducting the study are presented in the Figure 1. The stages included the generation of an updated address data base of training institutions and firms operating in Poland, verification of the database, and conducting the study of the selected sample. In line with the assumptions of the project, the sample was to be of random character, and the individual stages of the study were to follow one another sequentially. Yet, due to the difficulties related to the creation and testing of the sampling frame, the process of verification ran parallel to the actual study. Moreover, the final sampling frame (verified through the verification questions designed) included so few (below 9000) firms and institutions that a randomisation with the assumed rate of return (60%) made no sense. The actual study was conducted on an exhaustive sample respecting the quotas resulting from the character of operation of a training firm or institution.

Figure 1

Stages in the survey of training institutions and firms in the first round of the BKL Study



Source: own study.

Study techniques, sample selection, and scientific toolkit

A range of problems and challenges were related to each of the stages, with the most significant being:

1. The already mentioned difficulties with generating a database of training institutions and firms caused by the fragmentation of training and advisory operation, covered by various sections of the Polish Classification of Activities (PKD) and high dynamics of changes in the training market: opening of new businesses, and the fall and/or change of the field of operation of the existing ones.
2. Difficulties with the verification of the initial database: caused primarily by the dated contact data in the existing registers and databases, but also by problems in establishing e-mail or telephone contact with representatives of training institutions and firms.
3. Difficulty in conducting the study proper, related primarily to 3 factors: the length of the research tool, level of detail of the information sought, specific characteristics of the research technique (i.e. CATI), and difficulties that are typical for analysing enterprises that not only do not gladly participate in surveys, but moreover are not eager to provide access to information whose gathering is highly time consuming (when it is necessary to seek for detailed data) or are considered not suitable for publication (e.g. data on the turnover and the number of clients trained).

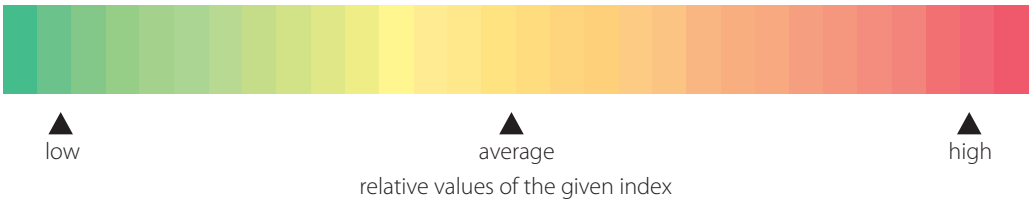
The research tool

The ground for constructing the questionnaire for studying training institutions and firms were the tools previously used in the area[2] which were adjusted to the type of studies conducted as part of the BKL Study, amended, complemented with additional questions, and adjusted to the research technique, that is, CATI.
The initial version of the research questionnaire was evaluated in pre-test and pilot studies and subjected to consultations with experts, with participation of representatives of the Polish Chamber of Training Firms, and representatives of the training institutions and firm milieu. The effect of these consultations and initial studies was a substantial shortening and simplification of the questionnaire, fine-tuning of the unclear and problem causing phrases, and expansion of the options available in closed questions.
In its final version, the questionnaire consisted of 40 questions, of which many were of open type, and many were complex questions covering multiple items. An interview conducted according to the questionnaire lasted on average for 30 min. A sample questionnaire is available from the project website: www.bkl.parp.gov.pl

Description of the colour scale

To help the analysis, many tables use colour coding, which follows the "topographic" approach that makes reference to the way maps are coloured: relatively low values are expressed by the colour green, average – yellow, and relatively high – red. It is to be emphasised that marked in this way are the relative values of individual indices, that is ones that show the position of a given item against the totality.

Colour codes in the tables



2 RIS registration form, questionnaire used in surveying training institutions in the PHARE project, and the questionnaire for surveying training institutions in the Małopolska Partnership for promotion and development of lifelong learning were used.

4. Training firms and institutions: review of study results

4.1. Description of training institutions and firms surveyed

One of the goals of the study of training firms and institutions conducted as part of the Study of Human Capital in Poland project was the description of operators in the training market. As the first national and representative study of the sector, it was of inclusive type, for which reason it covered institutions and firms of various type, whose major distinctive factor is providing training or consulting services.[3] Thus, accounted for in the study were the following institutions: training and training-and-consulting institutions and firms, vocational training centres, lifelong learning centres, and centres of practical training, training and training/consulting firms with various fields of operation, units of institutions of higher education offering services in lifelong learning, non-governmental organisations and other civic organisations running training or consulting services, language schools, and driving schools.[4]

The reason behind covering such a variety of entities with the study was the intention to create a full, even though necessarily general, description of characteristic features of the demand for training and consulting services in Poland. It was assumed that even though the institutions listed above provide services of various character – beginning with the most elementary courses necessary to obtain the B category driving licence and the mandatory training in safety at work, via language courses and courses serving the development of soft competencies, to the highly specialist business and occupational training and courses – they all operate in the area of lifelong education and develop competencies and skills that are crucial from the point of view of the employers' needs, which is the basic focus of interest in the Study of Human Capital in Poland project. Being aware of the high variety within the category of training firms and institutions construed in this way, while presenting the results, we will in most cases provide them broken down by the type of training institution, even though also such a type is an extensive category, as the firms that define themselves as training firms were regarded as one type of institutions, and training and consulting firms were considered another type, while centres of lifelong learning and centres of practical training – yet another type. Which shows that the categories are indeed broad. At this stage of the analysis discussed here, this is where one, however, needs to stop, even though it would have been possible to divide the training firms and institutions also by the thematic area of their operation. Such a categorisation, even though possible in the future rounds of the study, will not be applied this time, mostly due to the time limitations related to the preparation of this study. The description of training firms and institutions covered by the study that opens the report encompasses the following elements:

1. Type of training firms and institutions
2. Size of these institutions and firms
3. Territorial situation of the entities surveyed
4. Ownership
5. Turnover volume.

3 It is worth mentioning here that the surveys of training institutions conducted so far (e.g. the BIS study conducted in 2003 as part of the PHARE 2000 Krajowy System Training Zawodowego project) were of pilot type. The BIS study was conducted only in the Mazowieckie region, and covered 50 training institutions (see: *Rynek Pracy*, special issue, December 2003). Other studies were of regional character, as e.g. the study of training institutions conducted in Małopolska in 2007 as part of the project Małopolska Partnership for promotion – development of lifelong learning – model for exchanging information, tools, research, and best practices in the area of the labour market, education, and training (See: report available from the website http://www.wrotamalopolski.pl/NR/rdonlyres/98F5F814-6A50–4389–9B89-1D8D65911B79/363204/ilosciowe_instytucje4. pdf [as visited on 19.04.2011]). In turn, the studies conducted by the Institute of Management in 2004 covered only training institutions and firms from the data base of the Institute (See: report from the study available from the website: http://www.parp.gov.pl/files/74/75/76/raport_12.pdf) [as visited on 19.04.2011]).

4 The division was based on the categories found in the Register of Training Institutions and Firms, and amended after consultations with representatives of the training world. Its representatives noted that the division used in RIS is not uniform, as it concerns on the one hand, the specific features of the activity conducted (e.g. vocational training centre, driving school), and on the other hand – the legal form of operation (foundation, association, private training firms). A decision was made to ring this division down to the area of activity conducted, yet that meant that operators who were neither ODZ, nor CKU, nor CKP, nor driving schools nor language schools had to be classified as training or training and consulting firms. These categories are extensive and internally differentiated, yet the establishment of narrower work categories would mean the need to divide the firms by the subjects range of the training offered, which in many cases would be very difficult due to the variety of the services offered.

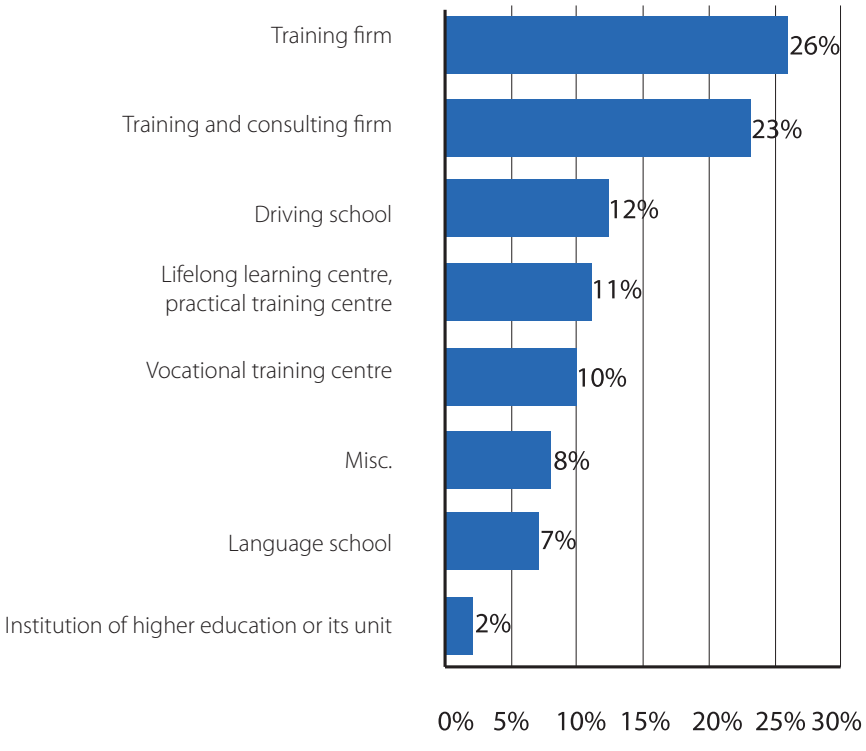
Description of training institutions and firms surveyed

Types of training institutions and firms covered by the study

The most numerous category among the training institutions surveyed were the training and training and consulting firms, internally varied due to the scope of operation (together accounting for 49% of the businesses studied), which did not classify their operation in the remaining categories, i.e. were not centres of vocational training and education, centres of lifelong or practical learning, units of institutions of higher education, language schools, and driving schools. Considering the proportion in the sample, the third largest category of institutions were driving schools (12%), the fourth – centres of lifelong and practical learning, and the following – vocational training centres. The number of other businesses (8% of the sample used) included primarily foundations and associations offering additional education (4%), trade unions, cultural and educational institutions, including culture centres and libraries conducting training (2%) and assorted courses, and other firms and institutions providing training services as part of additional activity[5] (2%), (see: Chart 1). In the sample studied private businesses were a decided majority as they accounted for 82% of the sample, with the remaining 18% being public entities.

Chart 1

Types of institutions and firms survey (N=4490)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

5 The study covered also teacher colleges, and foreign languages teacher colleges. Yet, as there were only 12 of such entities in the entire sample, and considering the fact that, in line with the novella of the Law of higher education Act, they must stop recruitment no later than in 2012 or be included in institutions of higher education, they were not accounted for in the analysis. As the data collected proved, their situation is sufficiently different from the situation of the remaining businesses covered by the study to influence the results of the analysis. It is also worth adding that in most of the analyses using the type of institution as the criterion for differentiation of the surveyed enterprises presented in this report the category "miscellanea" was omitted due to its heterogeneity being much higher than in the case of the remaining categories.

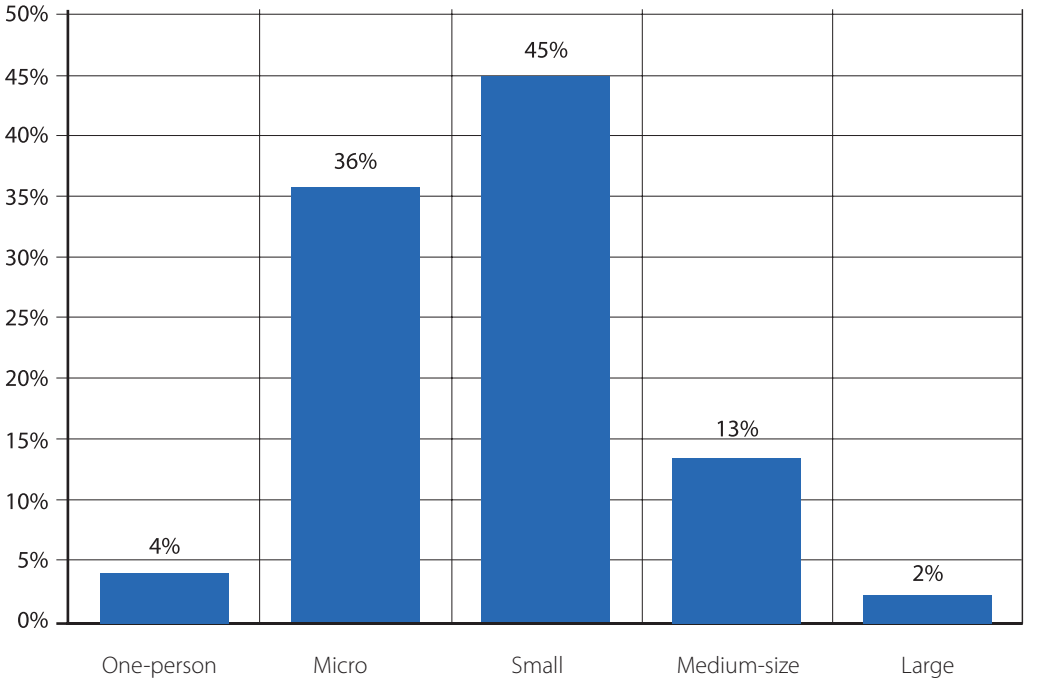
Size of training firms and institutions covered by the study

The institutions surveyed were classified according to size, in this case defined by the number of people employed. Taking into account the specific characteristics of employment in the training services sector, this number includes not only people employed on the power of contract of employment, but also people in other forms of employment, including commission contracts and freelance agreements. Accounted for are also the self-employed who permanently collaborate with a given institution. It is so as the goal was primarily to estimate the human resources potential of the given institution or firm, and not to determine the number of people that it formally employs.[6] Such a phrasing of the question results in the possibility of counting one person – being in most cases the person performing the training – a member of staff in a number of institutions, which was however unavoidable in the case of the specific operation performed by training companies, and the character of the information sought.

A decided majority of training institutions and firms covered by the studies are small businesses employing from 10 to 49 people, which account for 45% of all the businesses surveyed. The second largest category in the sample are micro-companies, employing from 1 to 9 people (36%). Altogether, small, micro-, and one--person businesses account for 85% of the businesses surveyed. Only 13% are medium-sized enterprises with employment ranging from 50 to 249, and only 2% are large institutions with employment exceeding 250 people (see: Chart 2).

Chart 2

Size of training institutions and firms surveyed (N=4502)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

6 It is worth adding that in the original version of the questionnaire that went into testing, questions were asked about the number of people employed on the power of various forms of contracting: employment, freelance agreements and commission contracts, and issuing of VAT invoices. Yet the means to provide so detailed information caused major problems for institutions, and in result made carrying out the research more difficult. Moreover, the information provided was frequently imprecise, refusals were frequent, and data was often missing. Therefore, the question was removed after the pilot project, and a general estimation of human resources in the institutions covered by the survey was considered satisfactory.

Description of training institutions and firms surveyed

Putting the volume of employment beside the type of the firm, we see that small institutions are dominant in most types, with the exception of driving schools, where not fewer than 65% are micro-businesses employing up to 10 people, and 7% are one-person businesses, and – on the other hand – of institutions of higher education or their units, among which medium-sized, small, and large enterprises were dominant.[7] Detailed data is presented in Table 1.

Table 1

Type of training institution or firm surveyed vs. its size (N=4490)

	One-person	Micro	Small	Medium-size	Large
Language school	3%	30%	53%	12%	1%
Lifelong learning centre, practical training centre	2%	23%	47%	27%	2%
Vocational training centre	3%	25%	47%	21%	4%
Institution of higher education or its unit	0%	5%	30%	42%	24%
Driving school	7%	65%	26%	2%	0%
Training firm	6%	34%	47%	11%	2%
Training and consulting firm	3%	38%	47%	11%	1%
Misc.	1%	31%	50%	15%	2%

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Territorial distribution of training institutions and firms surveyed and the geographic scope of their activity

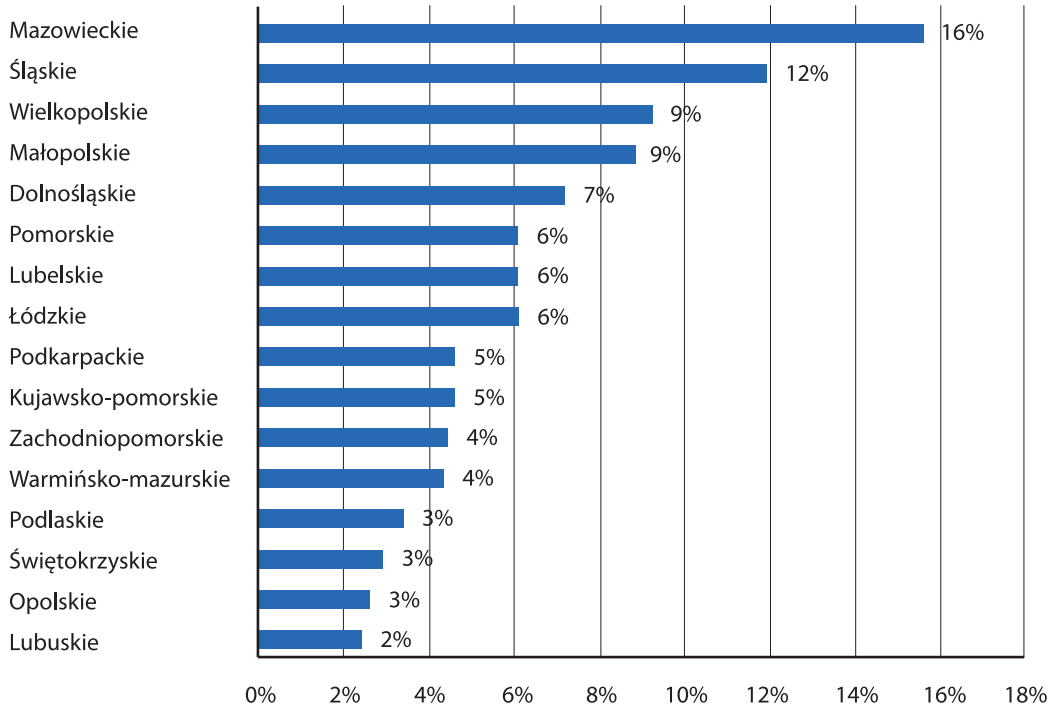
In the sample of training firms and institutions studied, most entities had their seats in the Mazowieckie, Śląskie, Wielkopolskie, Małopolskie and Dolnośląskie regions. The regions in which the smallest number of entities were covered by the study are Lubuskie, Opolskie, Świętokrzyskie and Podlaskie, as presented in the Chart 3. It must be remembered that due to the way of selecting the sample, the percentage share of institutions from the given region in the entire sample may provide no grounds to estimate the proportion of firms from the given region in the total number of operating training firms. Nevertheless, as the percentage shares of entities from given voivodeships were similar in the initial, not verified listing of the 29,407 training firms and institutions and in the verified listing, this information may be treated as a good approximation of the territorial distribution of training firms and institutions operating in Poland.[8]

7 In the case of institutions of higher education, this data may not always be easily interpreted as some representatives of these units counted all people employed at the institution, while others only people collaborating with the unit offering courses, training, and consulting services.

8 This data is moreover, largely coherent with the data published in the RIS Report of 2007. According to the report, the number of training firms and institutions registered in RIS included most businesses from Mazowieckie (15% of the total number) and Wielkopolskie (11%) regions. See: Ministry of Labour and Social Policy, Labour Market Department, *RIS. Raport 2007. Instytucje Szkoleniowe i ich oferta*, Warszawa 2008.

Chart 3

Percentage of training institutions and firms from the given region in the total number of surveyed institutions (N=4502)

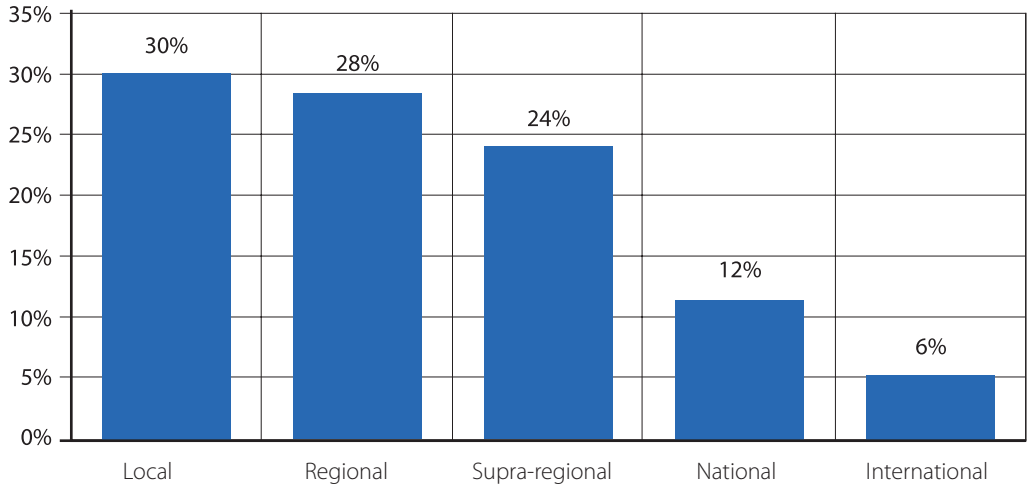


Source: BKL Study – Study of Training Firms and Institutions 2010.

Nearly a third of training firms and institutions surveyed operate locally, that is their operation covers only the town or neighbourhood in which the institution or firm operates, 28% find clients for their services within the region in which they are situated. Nearly a quarter of institutions declared that they operate in the entire country. Institutions operating in Poland and also abroad account for 6% of the entities studied (see: Chart 4). Majority of institutions of local character are language schools and driving schools, and most businesses of national character are found among training and consulting firms (see: Table 2).

Chart 4

Scope of activity of training institutions and firms surveyed (N=4502)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Table 2

Type of training institution vs. its territorial reach (N=4490)

	Language school	CKU CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm
Local	63%	31%	29%	14%	64%	21%	15%
Regional	22%	33%	34%	32%	28%	28%	25%
Supra-regional	4%	12%	11%	16%	3%	13%	17%
National	9%	18%	23%	31%	5%	32%	35%
International	2%	7%	3%	8%	1%	6%	8%

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Experience of training firms and institutions

Every other firm and institution covered by the study has existed in the market for a period shorter than 8 years. The institutions and firms with the largest number of entities operating longest are driving schools (with every other being in the market for more than 13 years), vocational training centres (50% existing in the market for over 12 years), practical and lifelong education centres (50% existing in the market for over 10 years), and language schools and units of institutions of higher education (with every other such entity operating in the market for over 9 years). Relatively shortest in the market has been the life of training and training and consulting firms, as in their case 50% of the firms included in the study have operated for less than 6 years. Detailed information about the experience of the various types of training firms and institutions present at the market is presented in Table 3.

Table 3

Experience of training firms and institutions

	From 1 to 4 years	From 5 to 9 years	From 10 to 15 years	16 and more years	N
Language school	21%	31%	23%	25%	324
CKU, CKP	21%	27%	27%	25%	471
ODZ	25%	16%	21%	38%	450
Institution of higher education	18%	33%	31%	19%	95
Driving school	19%	17%	25%	39%	557
Training firm	42%	20%	20%	18%	1165
Training and consulting firm	40%	25%	19%	16%	1041
Total	31%	22%	22%	24%	4103

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Size is a distinctive factor in the experience of a training institution: as could be expected, large firms and institutions have been in the market for a longest time, and micro- and one-person businesses – for a shortest. Another distinctive factor for the experience of the training institution is the type of ownership: public institutions covered by the study have existed in the market longer than the private ones.

Turnover of training firms and institutions surveyed

The question about the volume of turnover in 2009 was answered by fewer than 40% of the training institutions and firms covered by the study.

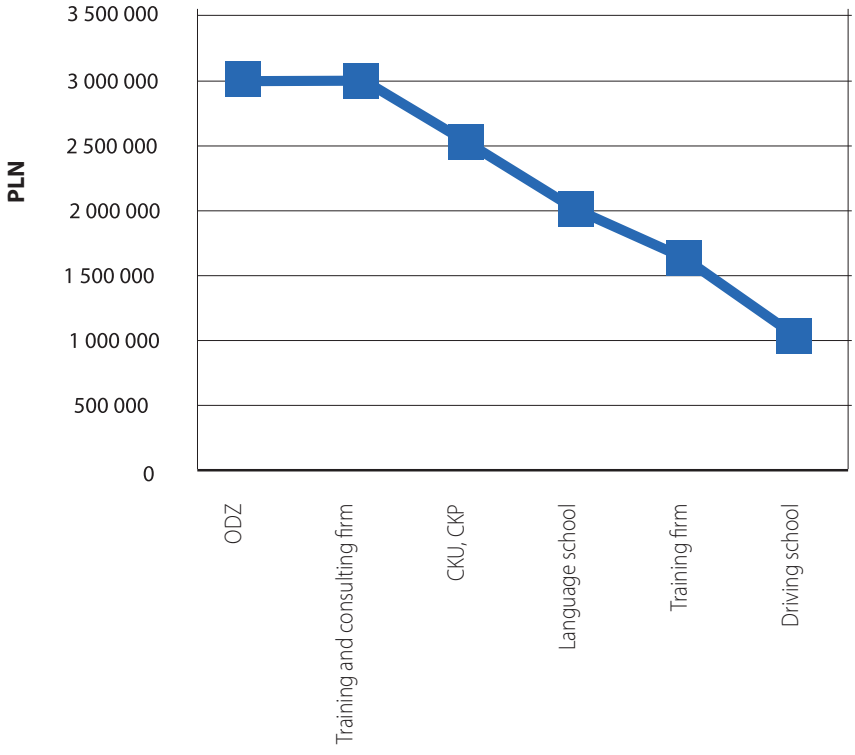
A very high rate of refusals to answer the question proves that training institutions and firms either do not want to disclose such information or are afraid to disclose such data. The question has already caused controversies during the pilot studies, after which additional assurance of confidentiality of the data provided was included together with an appeal to provide it. Information on the turnover was to be one of the factors taken into account in the segmentation and definition of the market position of training institutions and firms. Due to such a serious shortage of data and frequent imprecisions in the data provided, this information cannot be used for that purpose. In the present form, this information may provide only a very general approximation of the volume of turnover in the sector of training services.

As presented in the Chart 5, the turnover of 50% of all the training firms and institutions that provided relevant information did not exceed PLN200,000. The median that is the middle value of the turnover was highest among the institutions of higher education and their units, where it amounted to PLN400,000,[9] second came the vocational training centres, and training and consulting firms, where it stayed at PLN300,000. Further came centres of lifelong and practical training (with the median of PLN250,000), language schools (median of PLN200,000), training firms (median of PLN160,000), and driving schools (median of PLN100,000).

9 What, however, must be taken into account is that information about the turnover was provided by only 23 units of institutions of higher education. Moreover, there is again a concern that the data provided include the turnover of the entire institution, and not only the revenues from operation in the field of lifelong learning.

Chart 5

Declared turnover in 2009 median in various types of training institutions[10]



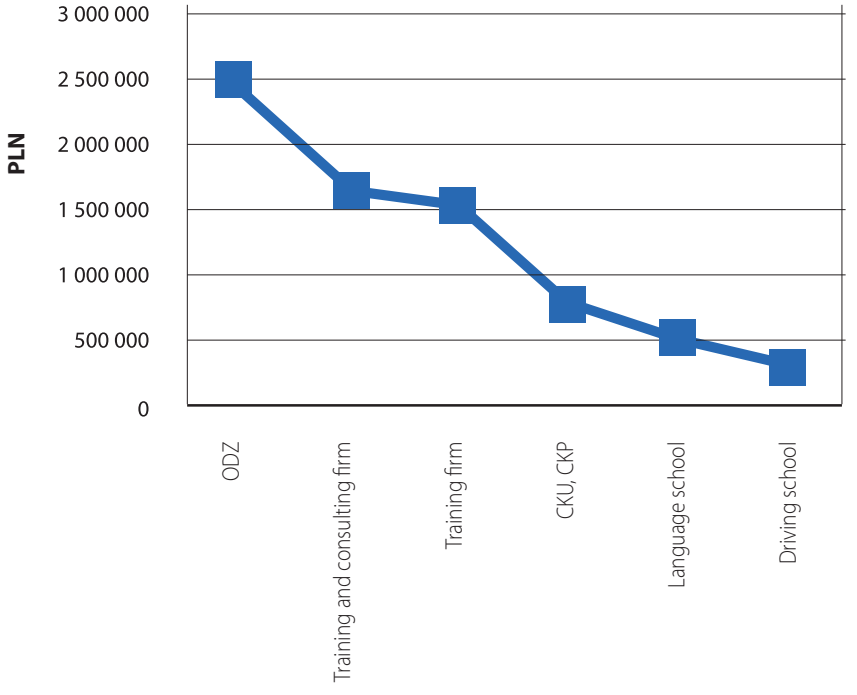
Source: *BKL Study – Study of Training Firms and Institutions* 2010.

The average declared turnover of training institutions and firms surveyed was much higher than the median, as its value was increased by the entities that, although few, had very high turnovers. Even though businesses with turnovers exceeding PLN 1 million accounted only for 17% of those that provided information about the volume of turnover, their presence strongly increased the value of the average. The average turnovers in the types of training institutions and firms surveyed are presented in the Chart 6.

10 The chart does not present the turnover of institutions of higher education or their units, as they significantly differed from the remaining ones, and moreover – as has been noted before – they presented the turnover of entire institution and not of the unit in question.

Chart 6

Average turnover declared in 2009 in various types of training institutions



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Detailed information concerning the volume of turnover of a given type of training firms/institution is presented in Table 4.

Table 4

Volume of turnover of training institutions and firms surveyed

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm	Total
up to PLN 25,000	12%	14%	10%	0%	7%	11%	6%	9%
from PLN 25,001 to PLN 50,000	8%	9%	8%	4%	14%	15%	7%	10%
from PLN 50,001 to PLN 100,000	16%	9%	13%	9%	33%	16%	16%	17%
From 100 001 zł to 200 000 zł	20%	14%	13%	0%	15%	13%	14%	14%
from PLN 200,001 to PLN 500,000	28%	25%	19%	0%	22%	16%	21%	20%
from PLN 500,001 to PLN 1 million	10%	13%	16%	4%	7%	12%	13%	12%
above PLN 1 million	5%	17%	22%	83%	2%	16%	22%	17%
N	110	175	148	23	230	449	475	1739

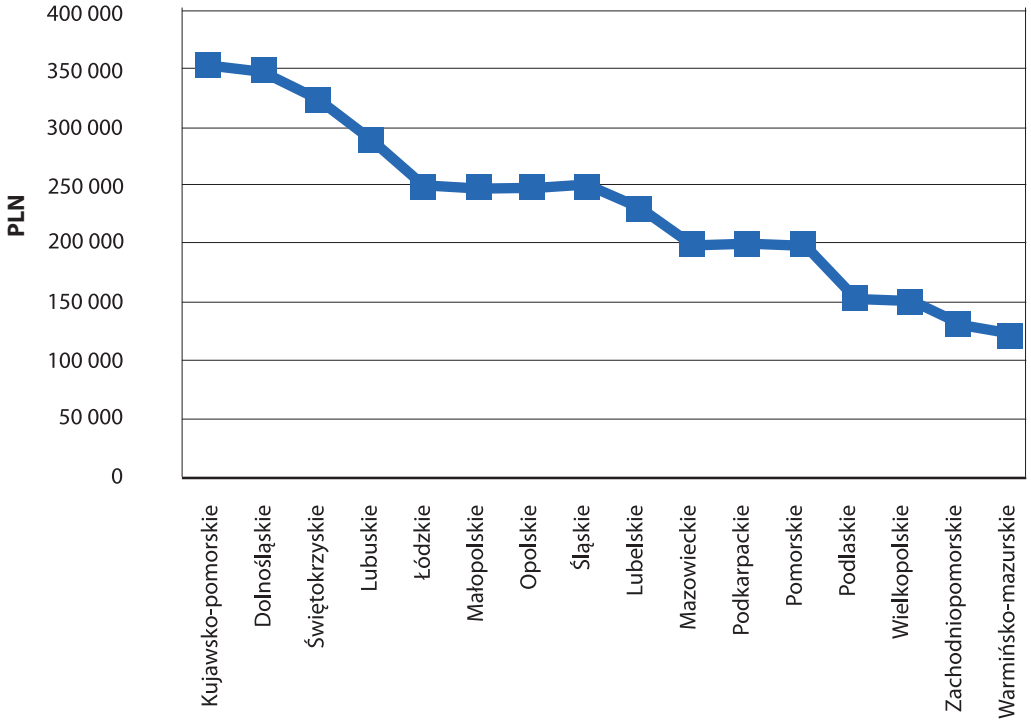
Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Description of training institutions and firms surveyed

The Chart 7 presents the differentiation of the turnover median in training institutions and firms in individual regions. As can be seen, the turnover median was highest in the Kujawsko-Pomorskie region, where, as declared by the respondents, the turnover of every other entity surveyed exceeded PLN354,000, followed by the Dolnośląskie region, where every other entity declared turnover exceeding PLN350,000, and in Świętokrzyskie, where the turnover in every other business exceeded PLN325,000 in 2009.

Chart 7

Turnover median in training institutions and firms in individual regions

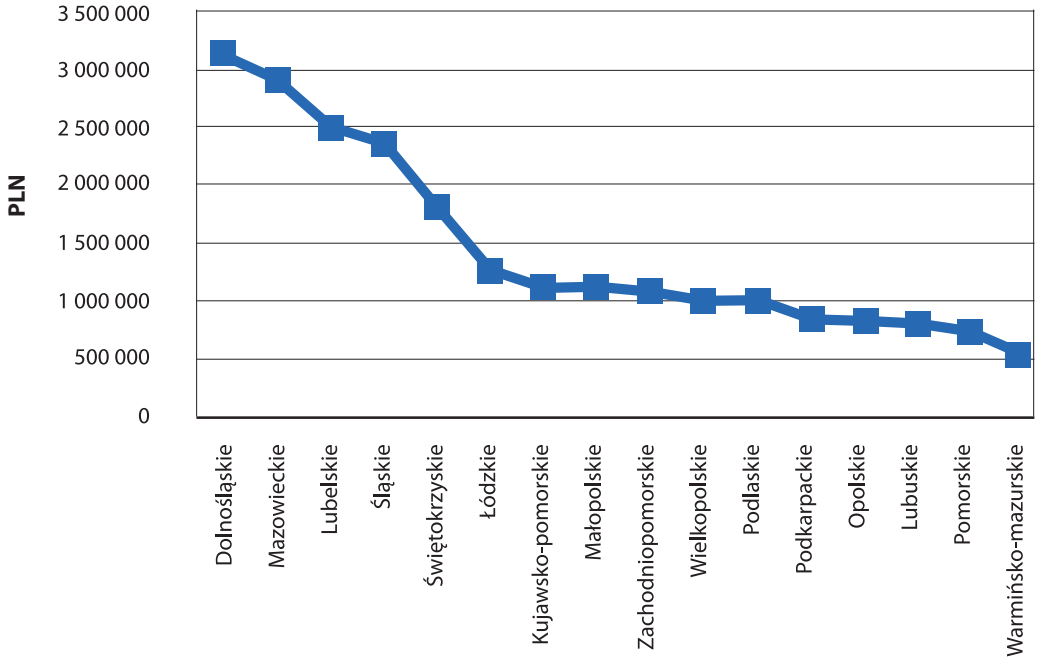


Source: *BKL Study – Study of Training Firms and Institutions* 2010.

The distribution of average declared turnovers of training institutions and firms in individual regions looks somewhat different. In this case first came the training firms and institutions from Dolnośląskie region with average turnover of PLN3,144,000, second came training institutions and firms from Mazowieckie region, with average turnover of PLN2,900,000, and third entities from Lubelskie region, with average turnover of PLN2,498,000. The distribution of average turnover of training firms in individual regions is presented in the Chart 8.

Chart 8

Average turnover of training institutions and firms in regions Average turnover of training institutions and firms in regions



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

4.2. Services offered by training institutions and firms

In this part of the report, we present information concerning the forms of additional education and training offered by training institutions and firms, and the subjects range of the courses on offer.

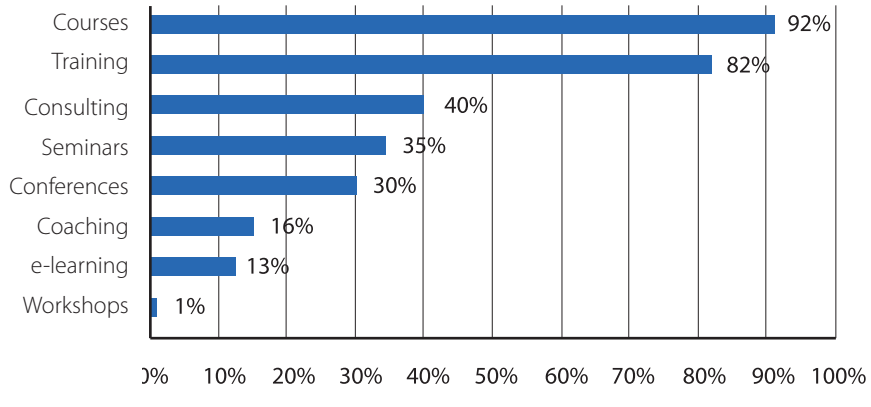
Available forms of additional education and development

The range of services of the institutions and firms surveyed as far as the proposed forms of education offered are concerned, is varied: altogether 60% of the entities covered by the study offer three or more forms of education, 27% – two forms of education, and 50% – one. As far as the variety of the offered forms of development is concerned, the most extensive is the offer of services of training and consulting firms, which on average offer four different forms of education, followed by the services of institutions of higher education and units of these institutions, also with the average of four forms of education. Typically three different forms of education are proposed by lifelong and practical training centres, vocational training centres, training firms, teacher colleges, and foreign language colleges. Two forms of education (usually courses and training) are offered by language schools and driving schools, which obviously results from the specific characteristics of their operation.

The most popular form of education, offered by more than 9 out of 10 entities covered by the study are courses[11] (mentioned by 92% of training institutions and firms). Second most frequent form of education offered is training[12] (offered by 82% of entities), third comes consulting (offered by 40% of the entities) with seminars[13] (among the services offered by 35% of the entities survey) ranking below, and followed by conferences (30%), coaching (16%), and e-learning courses (offered by 13% of firms and institutions). The other forms of education on offer include workshops (1%), postgraduate studies (0.2%), and private tuition (0,1%) (see: Chart 9).

Chart 9

Forms of education offered by training firms and institutions (N= 4502)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

11 A course is defined as a non-school form of education, with duration not shorter than 30 hours of education, whose completion allows acquisition or complementation of general knowledge, skills or professional qualifications, conducted according to a teaching curriculum approved by the organiser of this form of education. See: Ordinance of the Minister of Education and Science of 3rd February 2006 Journal of Laws of 27th February 2006, No. 31 item 216.

12 According to the PIFS Glossary of Training Terms, training is "education, improvement of someone['s knowledge or skills] in a given field, usually in a summary mode. See: http://www.pifs.org.pl/slownikpojec/20/2.html [as visited on 02.05.2011].

13 A seminar is a non-school form of education, with duration not shorter than 5 hours of education, whose completion allows acquisition or complementation of knowledge of a specific matter, conducted according to a teaching curriculum approved by the organiser of this form of education. See: Ordinance of the Minister of Education and Science of 3rd February 2006 Journal of Laws of 27th February 2006, No. 31 item 216.

As far as the use of forms of additional education and development including traditional courses and training does not differentiate the types of institutions surveyed, the scope of use of such forms as seminars, conferences, online courses, and consulting portrays the specific characteristics of the area in which individual entities operate. As can easily be guessed, seminar and conference forms are least frequently resorted to by language schools and driving schools, while consulting is most frequently present in the range of services of training and consulting firms. Online courses, generally relatively rare on offer, are most often found in the range of services of institutions of higher education (offered by 26% of such entities) and language schools (24%). Coaching is offered primarily by training and consulting firms (37% of businesses of this type mentioned them) but also by institutions of higher education and their units (19%), and training firms (13%).

Subject range of the courses, training, and other forms of development of human resources offered

Description of the range of services of training firms in terms of the subject range of the courses, training and other forms improving the quality of human resources, covers the presentation of the services offered in the previous year (2010), the current range of services, and those planned in the coming three months. Additional information concerns the subjects enjoying the greatest interest of the clients and the subjects that representatives of institutions surveyed believe to be in largest demand during the coming 12 months, which, due to the time when the study was conducted, practically means 2011.

The subject range most frequently present among the services offered by training businesses in 2010, and the most popular subjects

If we treat together the subjects present in the range of services of training institutions and firms, without differentiating the forms of education, type of institution that offers education, and the character of the subjects offered (mandatory, e.g. safety at work, fire protection; basic, e.g. category A and B driving licence), what must be considered the most frequently available subjects are those related to motoring, maintenance and repair of motor vehicles (present in 25% of ranges of services offered by all training institutions), in this especially courses necessary to obtain various categories of driving licence. Second in frequency of appearance in the range of services offered are subjects related to the personal development and training of general competencies (22%), third come the subjects related to the extensive range of information technology matters (21%), further – construction and industry (18%), and safety at work, fire protection and first aid (18%). The range of services of 17% of the institutions surveyed included questions in law and enterprise management, and the services provided by 16% of firms – language training, and also training in trade, sales, customer care, and other services. 15% of the institutions and firms surveyed offer training in the questions related to education, psychology, and management of human resources, and 14% – in subjects concerning medicine, psychology, and social work, and also related to accommodation and food service activities, tourism and recreation. The subject range of various forms of training conducted does not differ by the region in which the surveyed institutions operate, which means that the range of training services analysed at the level of general thematic categories is similar in all the regions of Poland.

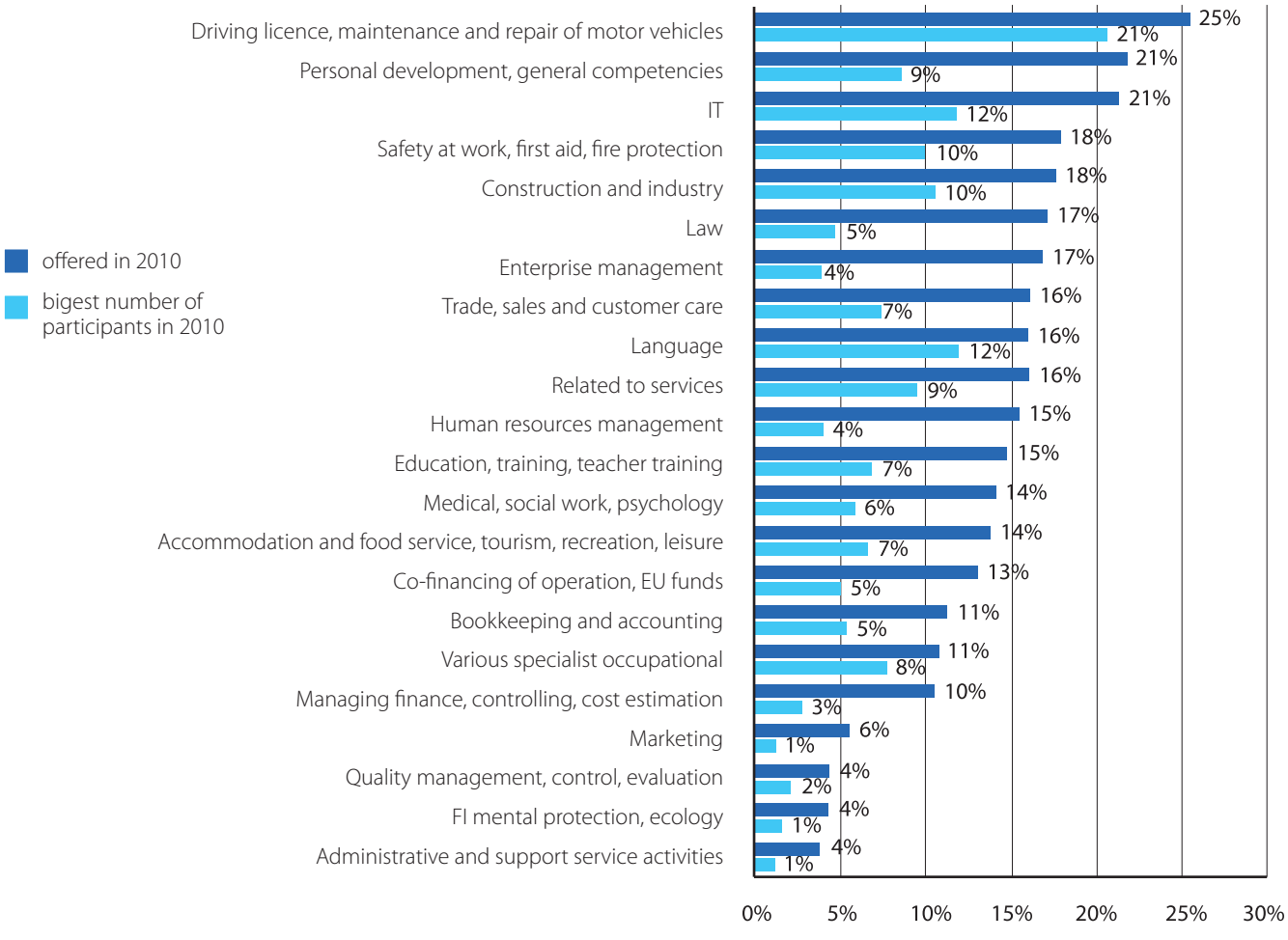
The ranking of the most popular training activities, that is ones which – according to the declarations of the respondents – allowed training of the largest number of people looks somewhat different than the ranking of frequency of subjects offered. As far as the motoring subjects (acquiring licences to drive and operate vehicles) come first in both cases, the second place here is taken jointly by language and information technology training, followed closely by subjects linked to safety at work, first aid, and fire protection, and also subjects from the area of broadly construed industry and construction. As results from the declarations of representatives of the training sector, highly popular was training related to personal development and training of general competences, and related to the development of competences necessary in personal services, including cosmetology, hairdressing, tailoring, floristics, and care for children and the elderly.

Detailed information on the general subject range of the offer of services of training firms, accounting for all types of training offered, and information about the subject range of courses and other forms of training enjoying greatest popularity in 2010 is presented in the Chart 10.

Services offered by training institutions and firms

Chart 10

The range of subjects offered in 2010 and the range of subjects in which the largest number of people received training (including safety at work, fire protection, and category A and B driving licence)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

If we disregard mandatory courses and training, e.g. safety at work and fire protection, and basic, e.g., leading to obtaining category A and B driving licences, the ranking of popularity of the subjects defined by its frequency in the range of services offered by training firms and institutions is as follows:

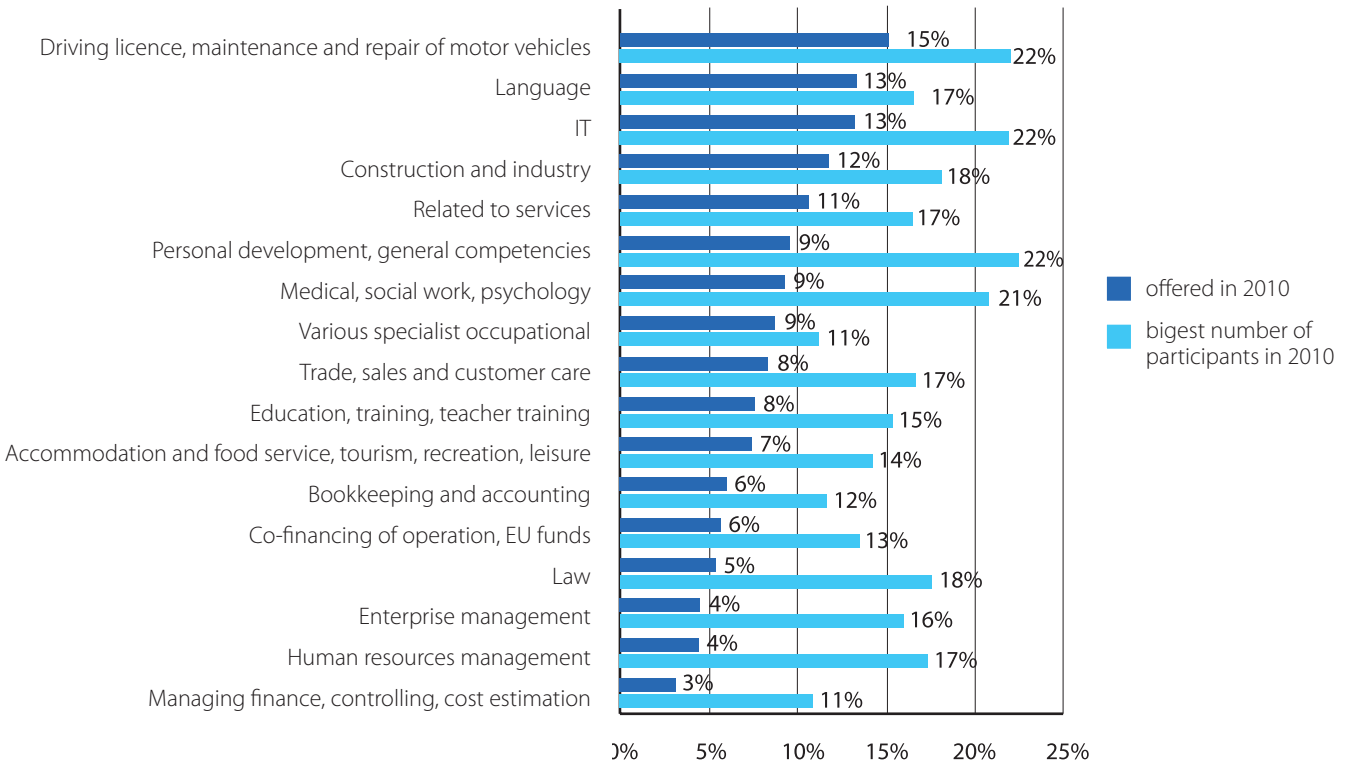
1. Personal development and development of general competencies.
2. Subjects related to motoring, and acquisition of licences to operate vehicles and machines, with the exclusion of category A and B driving licences.
3. Computer skills and IT
4. Medicine, psychology, social work (including first aid courses)
5. Construction and industry
6. Law
7. Enterprise management
8. Trade, sales and customer care
9. Foreign languages
10. Services (hairdressing, cosmetology, tailoring, floristics etc.)
11. Human resources management
12. Education, teacher training, schooling

The list of most popular subjects, that is ones in which most people were trained in 2010 (with the exception of mandatory courses and category A and B driving licence) includes the following:

1. Motoring, driving licences in categories other than A and B, licences to haul various loads, subjects related to maintenance and repair of motor vehicles
2. Foreign languages
3. Computer skills and IT
4. Construction and industry
5. Services (hairdressing, cosmetology, tailoring, floristics, etc.)
6. Personal development and development of general competencies
7. Subjects related to medicine, psychology, social work (including first aid courses)
8. Other specialist occupational subjects
9. Trade, sales and customer care
10. Subjects related to the education sector.

Chart 11

Subject range available in 2010 and subjects in which the largest number of people received training (except safety at work, fire protection, and category A and B driving licences)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Services offered by training institutions and firms

An analysis of the thematic variety of the range of services offered broken by the forms of education does not lead to spectacular conclusions: generally, the forms of training offered correspond to the character of the subject range they address. Dominant among the available courses were training of drivers, IT, construction and industry, and teaching foreign languages. The number of most frequently offered training services included also those allowing obtaining licences to drive vehicles, concerning safety at work, first aid, fire protection, personal development, acquisition of general competencies, and developing computer skills. Dominant among the seminars were questions related to safety at work, first aid, fire protection, and also ones concerning law, personal development and general competencies, medicine, psychology, education, and teacher training. The conferences found in the range of services offered by training businesses in most cases concern schooling and education, enterprise management, medicine, psychology, and personal development. Present most frequently among e-learning forms of training are subjects related to the teaching of foreign languages, IT, and also to motoring, safety at work, fire protection, schooling, and education. The consulting services offered pertain primarily to the acquisition of EU assistance funds, enterprise management, and personal development. The support provided through coaching most frequently concerns management of human resources, personal development, enterprise management, and trade, sales and customer care. Detailed information concerning the subjects range offered in various forms of education is presented in Table 5.

Table 5

Subject range of courses and other forms of training human resources offered during the last 12 months

	Courses	Training	Seminars	Conferences	e-learning	Consulting	Coaching
Driving licence, maintenance and repair of motor vehicles	26%	15%	4%	3%	15%	2%	1%
IT	16%	12%	7%	7%	21%	6%	3%
Construction and industry	15%	8%	10%	6%	3%	4%	2%
Language	15%	7%	2%	2%	22%	2%	2%
Related to services	14%	9%	4%	3%	2%	2%	1%
Accommodation and food service, tourism, recreation, leisure	11%	6%	4%	4%	4%	3%	3%
Personal development, general competencies	10%	14%	11%	10%	4%	10%	22%
Safety at work, first aid, fire protection	10%	15%	16%	2%	11%	6%	3%
Trade, sales and customer care	9%	11%	5%	2%	3%	3%	10%
Medical, social work, psychology	9%	7%	10%	11%	3%	6%	5%
Bookkeeping and accounting	8%	6%	4%	2%	3%	4%	1%
Education, training, teacher training	7%	6%	10%	16%	11%	6%	9%
Various specialist occupational	7%	2%	2%	2%	2%	5%	2%
Law	6%	10%	13%	9%	4%	11%	2%
Enterprise management	5%	8%	9%	13%	4%	15%	12%
Human resources management	5%	7%	6%	5%	3%	12%	33%
Co-financing of operation, EU funds	4%	5%	7%	10%	2%	18%	5%
Managing finance, controlling, cost estimation	3%	5%	8%	9%	3%	6%	4%
Marketing	2%	3%	3%	3%	2%	4%	1%
Quality management, control, evaluation	2%	3%	3%	2%	2%	4%	2%
FI mental protection, ecology	2%	2%	4%	6%	1%	2%	0%
Administrative and support service activities	2%	2%	1%	0%	2%	1%	0%
Culture, art, other artistic	2%	1%	1%	1%	0%	0%	1%
Financial services, real estate	1%	1%	2%	1%	1%	2%	0%
Warehousing	1%	0%	0%	0%	0%	0%	0%
Logistics and supplies	0%	1%	1%	0%	1%	1%	0%
N	4099	3629	1500	1254	560	1719	643

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Services offered by training institutions and firms

Even though the analysis of the range of subjects offered in such general categories portrays the scope of operation of the institutions covered by the survey, it does not allow acquisition of more detailed information concerning the areas of potential vocational and general development proposed by training institutions and firms operating in Poland. Therefore, presented below is more detailed information on these groups of subjects in courses, training, and other forms of human resources development that were mentioned earlier, as the most frequent in the range of services offered. To allow more synthetic nature of this information, it is presented in the form of a chart (see: Table 1).

As shown in the chart, in 2010 the most frequent subjects of training present among the services of training businesses were:

- safety at work training
- category B driving licence courses
- English language courses
- IT courses in handling software other than MS Office, handling online applications, e-learning platforms and corporate software
- training and consulting in enterprise management
- training in legal questions
- training in sales techniques and customer care.

Figure 1

Detailed list of subjects of courses, training, and other forms of human resources development most frequently offered in 2010

Operating, and repairing maintenance of motor vehicles	
Category B, B1 driving licence	13%
Category A, A1 driving licence	8%
Forklift truck operator	8%
Category C, C1 driving licence	7%
Driving licence, without stating the category	6%
Category B+E, C+E, and D+E driving licence	6%
Category D, D1 driving licence	3%
Category T driving licence	1%
Category C1+E, D1+E driving licence	1%
Motor vehicle mechanics and repairers, motor vehicle mechatronics service technicians, motor vehicle diagnosing and repairs	1%

Personal development, general competencies	
Seeking employment, writing CVs and motivation letters, job interviews	8%
Interpersonal communication	5%
Self-presentation and public appearance	3%
Assertiveness	2%
Time management	2%
Coping with stress	3%
Office and secretarial work, courses for secretaries and assistants	4%
Coping in conflict situations	1%
Group work skills, group work	1%

Safety at work, fire protection	
safety at work, safety at work regulations	14%
First aid	8%
Fire protection	3%

Enterprise management	
General related to enterprise management	10%
Project management	5%
Business plan	3%
Strategic management	2%
Production management	1%

Construction, industry	
Specialist in construction and industry	7%
Earthmoving, crane, hoist and related plant operators	4%
Electrical equipment installers and repairers, energy, electric installations, SEP licences	4%
Welder	4%
Gas, heating, sewage, air-conditioning, and ventilation installations	2%
Pavement and road surface layers	1%
Architecture, designing sites and buildings	1%
Electronics, mechatronics, automation	1%
Joiner	1%
Stationary plant and machine operator	1%
Machine tool setters and operators	1%

Law	
General legal	10%
Labour law	5%
Tax law	3%
Public procurement law	2%
Protection of personal data	1%
Trade, sales and customer care	
Sales techniques, professional customer care, sales manager	9%
Sales workers, cashpoint worker, fiscal registers	7%
Trade, business, price, procurement negotiations	3%
Misc. related to services, trade, sales, customer care	1%

IT	
Other IT (e.g. Photoshop, Corel, managing Moodle platform, e-learning applications)	12%
Information technology – computer literacy, e.g. Word, Excel, Power Point	9%
Information technology: programming	4%
Information technology: using specialist software related to the job	3%
Computer graphics	2%
Information technology – advanced: Administration of local (LAN) and wide (WAN) area networks, database administration and building	1%

Languages	
English language	13%
German language	7%
Misc. foreign languages	5%
French language	3%
Spanish language	3%
Italian language	2%
Russian language	2%

Trade, sales and customer care	
Sales techniques, professional customer care, sales manager	9%
Sales workers, cashpoint worker, fiscal registers	7%
Trade, business, price, procurement negotiations	3%
Misc. related to services, trade, sales, customer care	1%

Related to services	
Cosmetology, hairdressing, artistic make-up	7%
Floristics	3%
Care of the elderly	3%
Misc. related to services	3%
Tailoring, designing clothes	1%
Interior architecture	1%
Childcare	1%
Organisation of events	1%
Protective service worker	2%

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Services offered by training institutions and firms

In turn, the detailed subject range of courses, training, and other forms of human resources development which – according to the declarations of the representatives of the training institutions and firms surveyed – enjoyed the largest number of trainees in 2010 was as follows:

- Category B driving licence
- English language
- Safety at work
- Information technology – computer literacy e.g. Word, Excel, Power Point
- Category C driving licence
- Sales techniques, professional customer care, sales manager
- EU assistance funds
- Human resources management, team management, and leadership
- First aid
- Sales workers, cashpoint worker, fiscal registers
- Interpersonal communication.

The range of subjects that businesses included in the subject range of services offered to expand it, and the subjects which are envisaged to be in highest demand in 2011

Information presented earlier portrayed a range of services offered by the training businesses in 2010. It is worthwhile to supplement this picture with information concerning the range of subjects which have supplemented the range of services offered or are planned to supplement it in the nearest future, i.e. by the beginning of 2011.

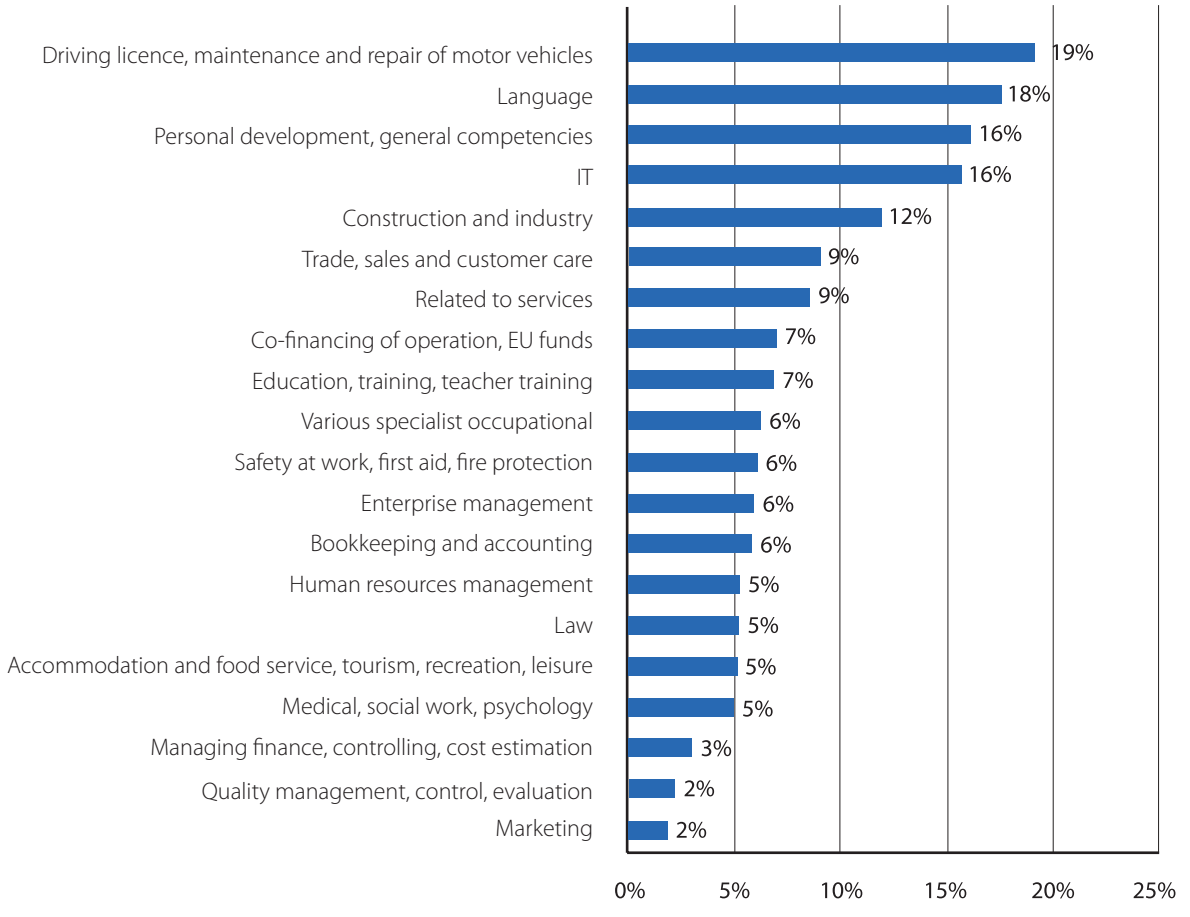
A study of both general and more detailed thematic categories proves that no significant changes in the thematic scope of training take place in the training market. Even though 58% of the training institutions and firms surveyed intend to expand the range of services they offer during the coming 12 months either by presenting forms of training and education they have not included earlier (e.g. e-learning) or by including new subjects to the range of subjects planned to be included among the services offered, no significant divergence from the current situation is visible. Representatives of training businesses that have recently expanded the range of training and education on offer and/or planned to expand it early in 2011 most frequently responded that the expansion concerns the following subject range:

- questions related to the personal services (hairdressing, cosmetology, floristics, artistic make-up, tailoring, etc.)
- personal development, development of general competencies
- foreign languages teaching
- information technology and computer literacy
- preparation to obtaining driving and machine operation licences
- construction and industry
- education, teacher training
- medicine, psychology, social work
- trade, sales and customer care.

Proving stabilisation in the range of subjects offered are also the forecasts of representatives of training businesses concerning the subjects in greatest demand in 2011. As shown in the Chart 12, the largest group of the respondents (nearly every fifth), representing training businesses suggested that there would be strongest demand for courses preparing to obtaining various categories of driving licences and licences to operate machines and devices (most frequently category B, and second most often – category C driving licence). Mentioned as often was the teaching of foreign languages (mostly English, with German being the second most popular), and also the subject range related to the personal development and training of general competencies, computer skills and operating computer software. Mentioned slightly less often were subjects related to construction and industry, and with occupations from the sector of personal services.

Chart 12

Subjects that representatives of training businesses believe to be in greatest demand in 2011 (N=3883)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

A study of more detailed thematic categories corroborates the tendencies pointed to above. It can be claimed therefore, that representatives of the training sector expect continuation of trends present so far, that is:

- high interest in training language competencies, especially English language
- demand for courses developing basic computer skills and literacy in IT tools
- demand for courses and training for drivers of motor cars
- demand for various, dispersed specialist occupational training
- interest in learning foreign languages other than English
- interest in development and training of sales techniques related to client care.

Services offered by training institutions and firms

Factors that decide about the range of subjects offered by training firms and institutions

A study of factors that decide about the shape of the offer extended by training institutions and firms is an important element of the situation in the training market. For this reason, representatives of the surveyed businesses were asked to evaluate selected factors that could influence the decisions about including specific subjects into the range of services they offered. The list of factors covered by the assessment was closed and beyond doubt did not encompass all the potential premises influencing the content of training on offer, nevertheless, it allowed the construction of at least an approximate picture of the factors that shape the subject range of training and development opportunities offered by training institutions and firms.

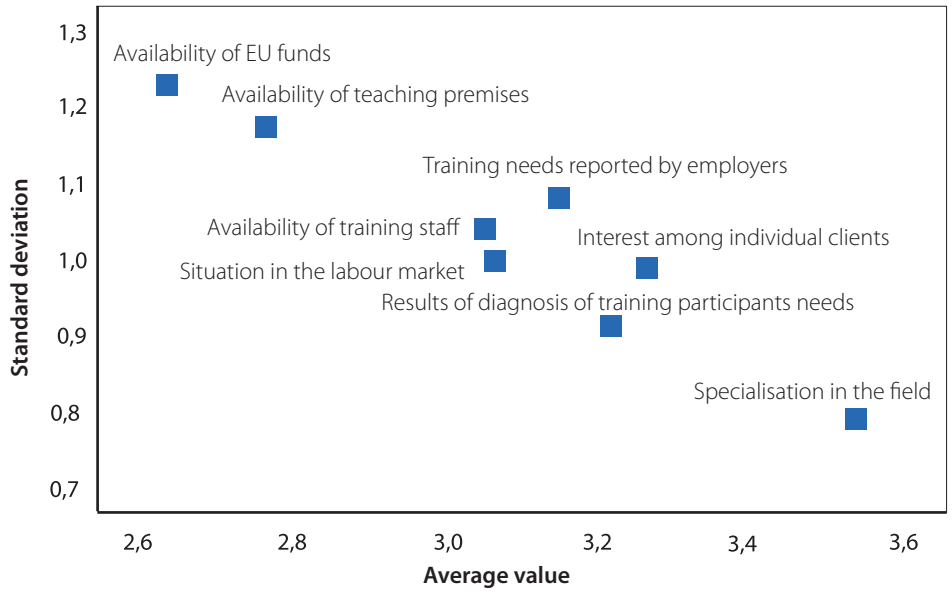
As shown in the Chart 13, the factors that the representatives of training institutions and firms surveyed believe to be especially taken into account while making decisions about the thematic scope of the forms of education offered are respectively:[14]

- specialisation of the firm/institution in the given field
- interest in the given subject expressed by individual clients
- results of the diagnosis of training needs of future training participants
- training demand expressed by employers
- needs of the labour market, resulting from the diagnosis of the situation in the labour market
- availability of trainers equipped with appropriate knowledge and skills
- rooms and their furnishing
- possibility of acquiring co-financing from EU funds

Worth paying attention is the fact that, in case of such categories, as far as focusing on a given subject range and interest of individual clients in a specific subject are concerned, the opinions of representatives of the businesses were rather uniform in the case of categories including the availability of EU funds and availability of teaching premises, the opinions were somewhat more differentiated, even though to a smaller extent.

Chart 13

Evaluation of significance of factors influencing the selection of training subject range



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

14 The significance of a given factor is presented on the horizontal axis: the higher its average importance, i.e. the closer to the right-hand side of the chart the given feature is, the more important it was considered by the respondents. The vertical axis portrays the differentiation of the opinion: the higher the given feature lies in the chart, the greater was the differentiation of the opinions of respondents while assessing the importance of the given factor.

The significance of the opportunity to acquire co-financing from EU funds as a factor taken into account while developing the range of services was appraised highly especially by representatives of large entities, including institutions of higher education and their units, and lowest – by representatives of driving schools. In turn, the representatives of driving schools far more often than others assessed highly the influence of the available premises on the shape of services they offered. In turn, the influence of availability of appropriate premises and their furnishing was considered lowest by the representatives of training and consulting firms, institutions of higher education, and training firms other than driving schools and language schools.
The number of other factors influencing the decision about selecting the subjects of the courses offered, not listed among the multiple answers, the following were pointed to most frequently:

- price of the training, its profitability
- binding standards, teaching curricula, and national, EU and international legislation
- unique character of the range of services
- training dates.

4.3. Human resources in training institutions and firms

Total employment

As it was noted in the part devoted to the characteristic features of the institutions surveyed, as far as the total employment is concerned, independent of its form, the training firms and institutions covered by the study are:

- in most cases, small businesses, employing from 10 to 49 people, which account for 45% of the institutions surveyed
- micro-businesses, employing from 2 to 9 people, accounting for 36% of the population surveyed
- medium-sized businesses, employing from 50 to 249 people, accounting for 13% of the sample
- one-person businesses, comprising 4% of the sample studied
- large businesses and institutions, employing 250 or more people, accounting for 2% of the institutions surveyed.

The average employment in the training firms covered by the study is 43, with every other employing up to 12 persons, and every other – more than 12.
Even though the level of employment in training institutions and firms does not significantly differ by type, a comparison of employment in various types of institutions proves certain characteristic features (see: Table 6):

- most one-man businesses and micro-firms are present among driving schools
- obviously, most large and medium-sized companies are among institutions of higher education and their units
- most small businesses are among language schools, yet here, differences between types of institutions are not large.

Table 6

Employment in individual types of training institutions and firms

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm	Total
1 person	4%	2%	3%	2%	7%	6%	3%	4%
From 2 to 9 people	30%	23%	25%	8%	65%	34%	38%	36%
From 10 to 49 people	53%	47%	47%	28%	26%	47%	47%	45%
From 50 to 249 people	12%	27%	22%	39%	2%	11%	11%	13%
250 and more people	1%	2%	4%	23%	0%	2%	1%	2%
N	315	461	438	89	556	1135	1023	4382

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Human resources in training institutions and firms

The number of educators, trainers, instructors, and other people directly involved in education, training, consulting

The training firms and institutions covered by the study employed 20 educators on average, with every other employing up to 7 such people, and the other 50% – more than 7 people. As can be expected, most people providing training are employed by institutions of higher education offering postgraduate studies, and courses and training (on average 122 people), yet this information must be approached with care, as representatives of these institutions most probably accounted for all the lecturers employed, and not only for people involved directly in conducting education in the form of lifelong learning i.e. courses, training, and postgraduate studies. Lowest employment is present in driving schools (on average 6 people), which is understandable if we take into account that these are the smallest of all types of businesses that were covered by the study. Detailed information concerning the total number of educators and their break down by type of institution is presented in Table 7.

Table 7

Number of people providing training and education in individual types of training firms and institutions

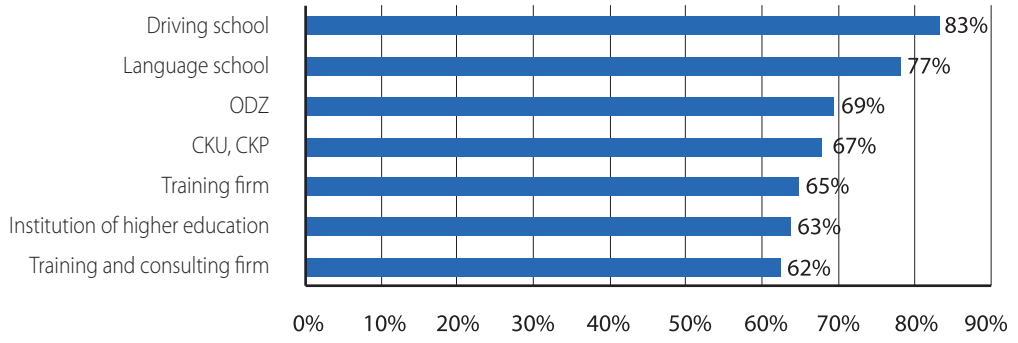
	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm	Total
From 1 to 2 people	9%	8%	10%	3%	21%	19%	17%	16%
From 3 to 4 people	11%	11%	13%	8%	28%	17%	19%	18%
From 5 to 9 people	29%	19%	20%	9%	34%	24%	27%	25%
From 10 to 19 people	28%	24%	19%	10%	15%	19%	20%	20%
20 and more people	23%	38%	38%	70%	3%	21%	17%	22%
N	313	454	432	89	556	1116	997	4310

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Additional information concerning the structure of employment in training firms and institutions is obtained by analysing the percentage share of the people involved directly in conducting training and education in the total number of the employed. Detailed data on that aspect is presented in the Chart 14 and in Table 8. The data proves that in every other business survey, trainers account for more than 75% of employment, and their average proportion in the total number of the employed amounts to 67%. Most trainers in the total number of the employed are present in driving schools, which results from the fact that this category of our operators features the highest number of one-person companies, whose owners are at the same time the driving instructors, and therefore also trainers. The relatively lowest proportion of people providing training in total employment is present in training and consulting firms, and in institutions of higher education. In the case of the first, this may result either from the character of their operation, as consulting and training are not the only area of operation of the firm or from the fact of operating a back office, namely human resources not involved directly in training, but in supporting activity. In the case of institutions of higher education, this in turn may result from the fact that the point of reference for the person answering the questions could be the entire institution with its (frequently extensive) administration, rather than just the unit dealing with lifelong learning.

Chart 14

Average percentage proportion of trainers in the total employment in training institutions and firms (N= 4320)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Table 8

Participation of educators, trainers, and instructors in total employment: total, and broken down by institution type

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm	Total
Below 20% of employment	3%	8%	7%	9%	2%	10%	9%	9%
From 20% to 49% of employment	3%	13%	16%	10%	3%	18%	23%	16%
From 50% to 74% of employment	22%	30%	23%	38%	20%	23%	27%	24%
From 75% to 99% of employment	55%	32%	38%	37%	35%	28%	23%	30%
100% of employment	17%	16%	17%	6%	41%	21%	19%	21%
N (Total)	314	456	425	87	553	1112	1013	4320

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

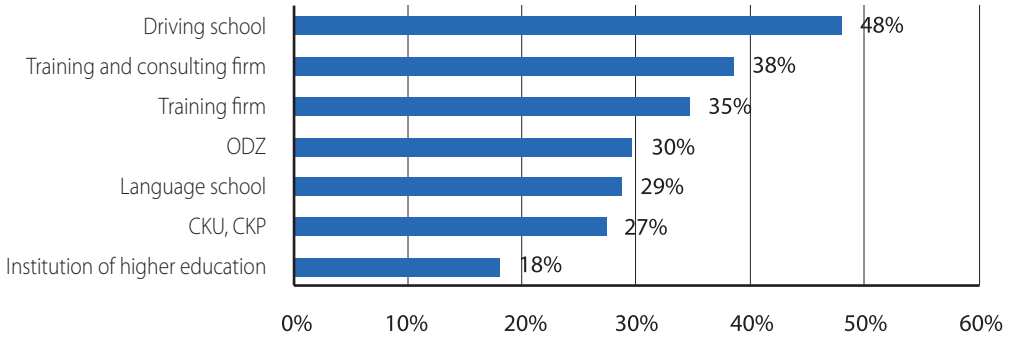
Number of the employed involved in design and administration of training, courses, and other forms of development offered

The analysis of the employment structure in training institutions considered also people dealing with administration of training, being the support personnel of such institutions. In every other institution surveyed, training support and administration is performed by up to 3 people, and the average number of staff performing these functions among all the businesses and institutions is 7. On average, most people dealing with the administrative services for the training services delivered are present in institutions of higher education (30), followed by vocational training centres (14), and lifelong education and practical training centres (8). The relatively smallest number of such people are employed in driving schools (3). Yet it is worth noting that when we consider the proportion of people dealing with administration of training vis-à-vis total employment, it is relatively highest[15] in the case of driving schools, with training and consulting companies (on average 38%) coming second, training companies (35%) – third, vocational training centres (30%) – fourth, and language schools (29%), lifelong education centres, and practical training centres (27%) ranking lower, and the last place in this aspect being held by institutions of higher education (18%).

15 This value must, however, be considered an approximation as both in the case of driving schools and in the case of other training firms and institutions, it is raised by people involved both in training and in its administration and support, e.g. acquisition of clients and promotion.

Chart 15

Average proportion (in %) of people dealing with training administration and support in the total employment in individual types of training firms and institutions (N=4320)

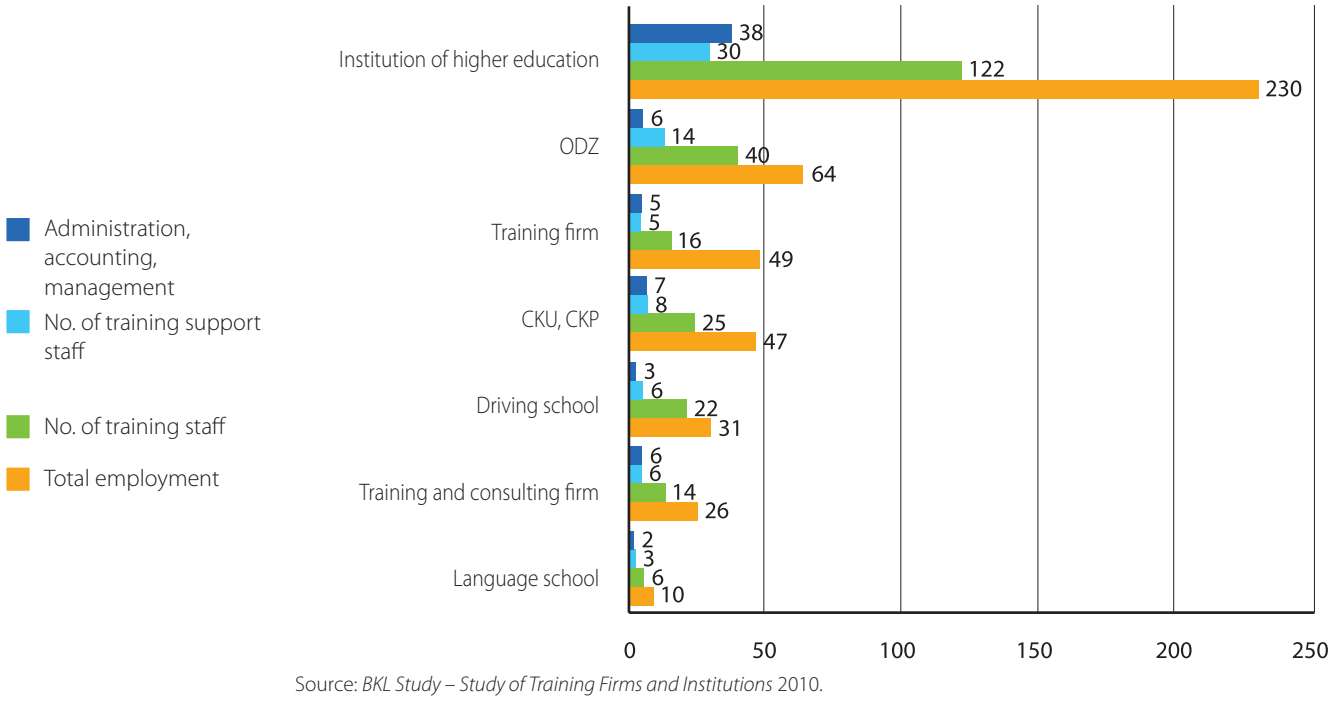


Source: *BKL Study – Study of Training Firms and Institutions* 2010.

In every other training firm and institution surveyed, people providing administration and support of training account for fewer than 25% of total employment, and in the other 50% – more than 25%. On average, independent of the type of institution, 35% of the employed provide administration and support of training.[16]
To sum up the general description of the human resources in training firms and institutions, the Chart 16 portrays information about the average number of people employed in individual types of institutions, average number of people providing training, the average number of people involved in training support, and the average number of people managing the firm and employed on administrative positions.

Chart 16

Average total employment, number of employed trainers and educators, people involved directly in support of training, and other people, broken down by the type of training institution



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

16 While interpreting this data, one needs to bear in mind that it is an approximation. First, the values given by representatives of training firms were frequently only approximations, and secondly – with respect to the specific traits of one-person, micro- and small businesses, where one person frequently plays a range of functions – it was possible to list such a person in each category: trainers, people dealing with training logistics, and managers of the business.

Training and consulting staff: criteria of selection, education, and certificates of trainer competencies

Beyond doubt, the quality of training staff is one of the most important factors deciding about the quality and results of training or other actions that serve acquisition and improvement of competencies and/or qualifications. Although this goes without saying and no one needs convincing, it seems that the problem is still paid too little attention, and is not subject to systematic observation. There are, in fact, interesting research initiatives engaged in, including, for example, the Diagnosis of Trainer Competency Gaps project,[17] conducted by PARP in collaboration with the Polish Chamber of Training Firms (PIFS) in 2009, which allowed collecting information concerning the competency of trainers cooperating with training businesses and their needs related to professional development. Basic information concerning the competencies of the trainers is also collected in the RIS, yet there only general questions about the number of trainers and educators, form of their employment, and education are asked, and this only in reference to the trainers employed full-time by the given institution.[18] Conducted also were smaller, regional studies concerning this range of questions, for example, the study conducted in Małopolska as part of the Małopolska Partnership for promotion – development of lifelong learning – model of exchanging information, tools, studies, and best practices in the area of the labour market, education, and training project.[19] Yet the projects mentioned above, with the exception of the systematic data collection in RIS, are only one-off and regional initiatives.

Due to the significance of the subject, it was devoted a number of questions in the study questionnaire addressed to training firms and institutions operating in Poland. Of need, these, however, were only general questions, as the respondents were not educators or trainers but representatives of firms, and the number of questions concerning this scope of interest had to be limited due to the study technique used. This is why representatives of training firms and institutions were asked only about the following:

- assessment of the importance of factors taken into account while employing educators and trainers,
- education of trainers
- number of trainers with any certificate of training competencies
- engaging in actions serving the development of competences of the trainers, types of such activities, and relevant subjects range.

Factors addressed while employing trainers

The factors considered while employing trainers allow ascertaining what representatives of training institutions and firms expect first of all, from the people who actually run the training. Which is why representatives of the firms were asked to assess 15 factors that can be important while making decisions about cooperation with trainers, instructors, and other personnel involved in training and consulting. The factors were assessed on a 4-point scale, where 1 meant that the given factor is absolutely irrelevant, and 4 – that it is highly relevant.

The result of the research shows that most of the presented factors were assessed highly and very highly, and moreover, the assessment of the importance of these factors did not discriminate significantly the respondents. The reason behind lack of differences and opinions must have been the fact that questions were asked about each of the factors independently, without forcing any ranking, which is why each of the factors could be considered equally significant. Moreover, the result was influenced by the character of the factors assessed, as the questions concerned education, certificates, references, skill of working with a group, knowledge and professional experience, and experience in running training. As all these elements are beyond doubt significant, it was hard to expect a greater variety in the evaluation.

17 See: Report from the Diagnosis of Trainer Competency Gaps research project, available from the website http://www.parp.gov.pl/index/more/9155 [as visited on 05.04.2011].

18 See: http://www.ris.praca.gov.pl:8090/ris/index.ftl

19 Górniak et al. 2007. *Kształcenie ustawiczne w Małopolsce w opiniach przedstawicieli instytucji działających w obszarze kształcenia ustawicznego. Raport z piątego etapu badań naukowych: badania ilościowe*. Kraków: WUP.

Human resources in training institutions and firms

As shown in the Chart 17, even though all the factors, with the exception of a recognised name, were considered relevant and very relevant, the following ranked the highest:[20]

- Honesty, reliability, responsibility (average 3.8)
- Professional experience and knowledge in the field being trained (average 3.8)
- Teaching skills, the ability to share knowledge (average 3.8)
- Interpersonal skills, the skill of working with a group (average 3.7)
- Experience in running training (average 3.6)
- Opinions of participants of the previous classes conducted by the trainer (average 3.4)
- Education (average 3.4)
- Flexibility and availability (average 3.3)
- The ability to identify the training needs (average 3.2)

There were small differences between the evaluators in the case of these factors, as most ranked them as relevant.[21] Somewhat higher, though still quite low, was the variation in opinions in the case of factors considered less important:

- A famous name (average 1.8%)
- Expected remuneration (average 2.8)
- Certificates held (average 2.8).

The variation in assessment of significance of the given factors, while employing trainers is shown also in the Chart 18, which includes only answers obtained from the people who considered that the given factor is highly relevant while choosing the trainers. Even though conclusions stemming from the analysis of these answers seem obvious, a number of questions are worth paying attention:

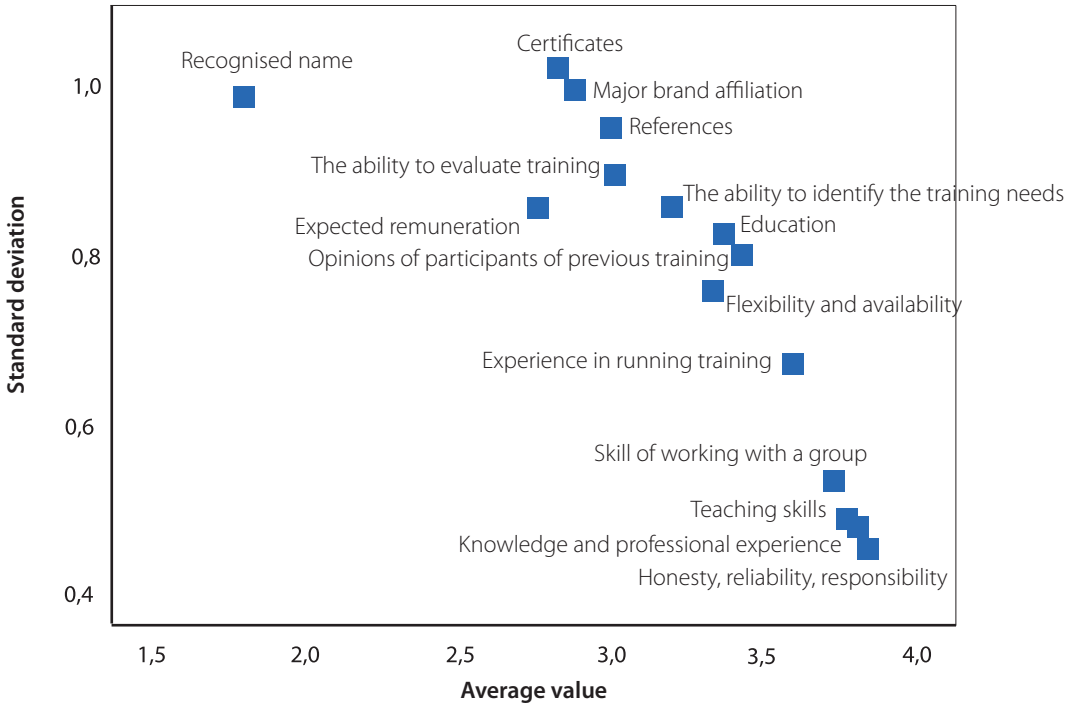
1. Representatives of training institutions and firms pay far more attention to the actual knowledge and professional experience than to the formal education and certificates obtained. Among the types of training institutions and firms researched, education is perceived the most significant in the case of language schools and vocational training centres, while it is paid least attention to in driving schools.
2. A great store is set by the generally perceived competencies necessary to perform the occupation of the trainer/educator:
   a) ethical dispositions: honesty, reliability, and responsibility.
   b) teaching, and interpersonal skills: ease in teaching and sharing knowledge and predispositions to working with a group
   c) experience in running training.
3. Relatively little attention was paid – at least at the declarative level – to the pay expectations of the trainers.

20 The greater the average relevance, i.e. the closer to the right-hand side of the graph 17 the point lies, the more significant the fact that it represents was for the respondents.

21 The higher a given feature is situated in the Chart 17, the greater was the variety between evaluators of the given factor.

Chart 17

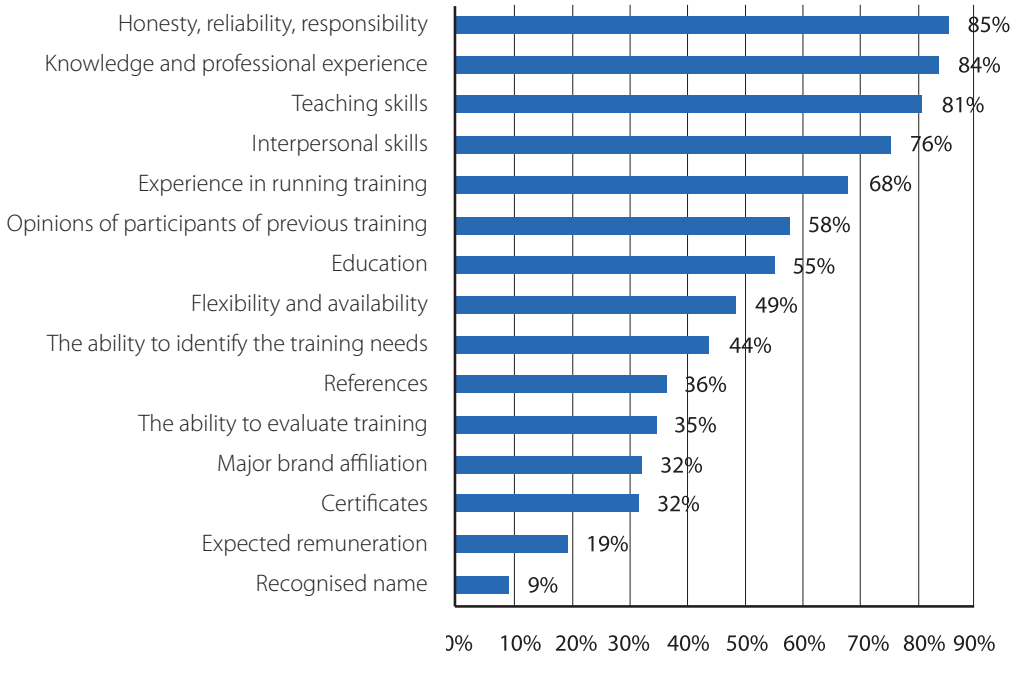
Relevance and variety of opinions concerning relevance of factors taken into account while employing trainers



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Chart 18

Percentage of the respondents considering the given factor highly relevant while making decisions about employing trainers



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

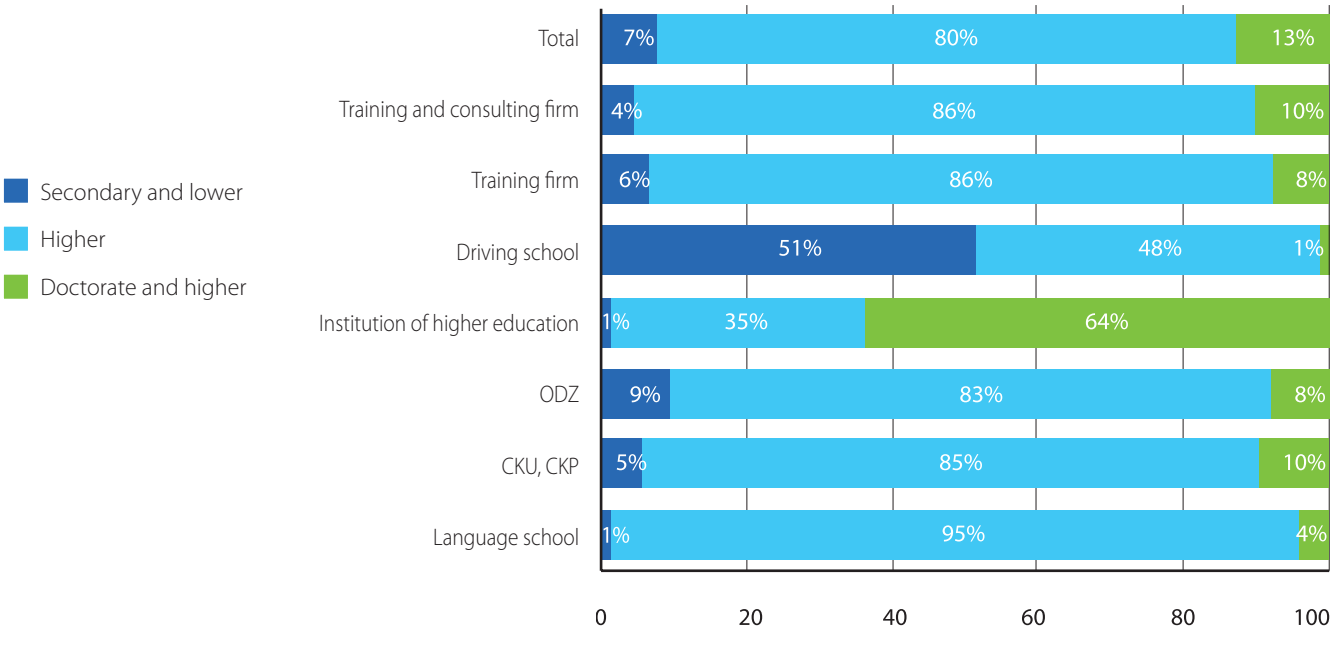
Education of the training staff and trainer competency certificates

One of the proofs of competencies of trainers cooperating with training firms and institutions is their level of education. Naturally, as an indicator, it covers only one of the aspects of training staff quality, which – as has been shown earlier – representatives of training firms do not pay greatest attention to, nevertheless, it is worth considering in the description of the training staff.

Taking into account the specific characteristics of the training profession, it is no reason to wonder that more than 9 out of 10 trainers, instructors, and other educators have higher education. Only 7% of people cooperating with the firms and institutions surveyed have secondary or lower education. Trainers with this level of education are mostly driving instructors: 51% of the driving instructors collaborating with driving schools have secondary and lower education (see: Chart 19). Another conspicuous category are the institutions of higher education, as their staff features most people with doctorates and higher professional degrees, which is, however, fully understandable in case of such institutions.

Chart 19

Percentage of trainers at specific levels of education in all training institutions, and broken down by institution type



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Additional information concerning training staff brings an answer to the question about the number of trainers with any certificates of trainer competencies. Nevertheless, it must be remembered that the results that we achieve in case of this question must be interpreted very carefully, as the very question of certification of trainer competence is problematic for a number of reasons. First, because there are no clear-cut standards in the area, the very notion of "certificate" is unclear. For some, it denotes the sign of quality awarded by an authorised organisation that corroborates that the person receiving the certificate is vested with competencies that are the subject of certification and not that the person only met some formal requirements e.g. participated in training. Others consider the document mentioned earlier, confirming participation in training or course as a certificate, even though, in itself, it does not guarantee acquisition of competencies whose acquisition the course or training was to lead to. Although the question asked to the respondents contained clear reference to certificates confirming the trainer competencies, and examples were given, this did not need to be understood unambiguously. Moreover, the interpretation of the results is made more difficult by the fact that due to the need to limit the number of questions and duration of the interview, and also the risk of acquisition of imprecise information, the question about the types of certificates held by the trainers was

resigned from. Secondly, the lack of unambiguous standards and/or criteria of assessment of the certificates operating in the training market results in the importance of these documents being highly different. Although there are documents that enjoy recognition of the training world, as for example recommendations of the Polish Psychologists' Association (PTP), the certificate issued by the TROP Group, Matrik International Trainer Certificate, the one issued by the Centre for Continuing Education and Academic Outreach of the Jagiellonian University, and others of similar value and renown, yet they operate beside many whose quality is frequently difficult to ascertain.[22]

Thirdly, the fact of possessing a certificate does not prove the quality of work of the person providing the training: lecturer, trainer, coach, mentor or consultant. As it was rightly remarked in the publication entitled *Jak się wyszkolić, by szkolić innych* (lit.: How to train yourself to train others) what counts in this profession are the dispositions that you first need to have to be able to develop and constantly hone.[23] Moreover, as has been shown earlier, being furnished with a certificate is even less significant for being employed as trainer than having an appropriate education. Therefore, interpreting the results presented below, one needs to consider the complexity of the question and the problems related. Moreover, the situation is going to be similar in the case of accreditations held by training firms and institutions.

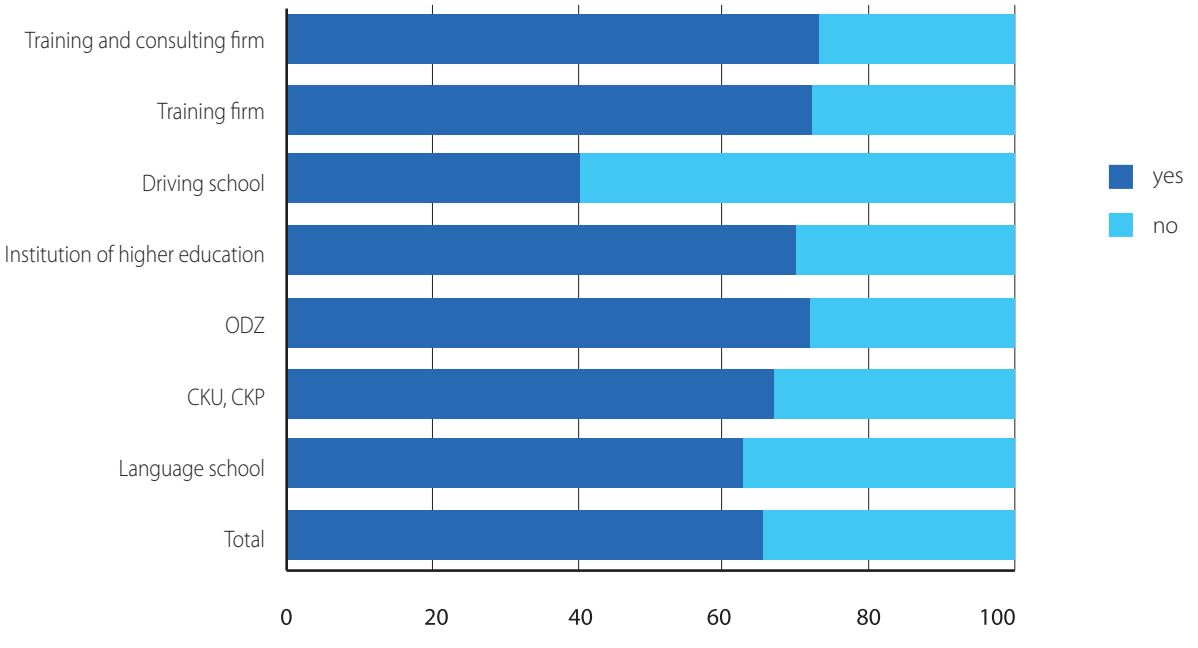
Altogether, 66% of representatives of training institutions and firms who answered the question declared that at least one of the trainers collaborating with them has a certificate of trainer competencies (see: Chart 20). Declarations about trainer certificates were most frequently made by:

- representatives of consulting and training firms,
- of training firms and vocational education and training centres,
- institutions of higher education,
- centres of practical and lifelong learning
- language schools.

Least frequently the presence of such certificates is declared by representatives of driving schools.

Chart 20

Possession of certificates of trainer competencies vs. type of training institution



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

22 PARP, 2009, *Jak się wyszkolić, by szkolić innych*, Warszawa: PARP, p. 9.
23 Ibidem, s. 5.

Human resources in training institutions and firms

According to the declarations made by the representatives of training firms and institutions, the trainers with certificates of trainer competencies have the highest percentage share among all the trainers collaborating with the firm, especially in:

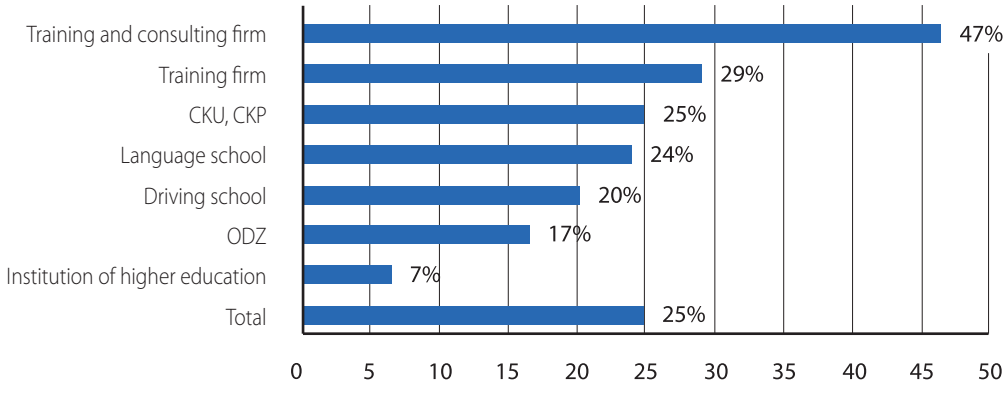
- Consulting and training firms, where they account nearly for every other trainer collaborating with the company
- Training firms: nearly a third of the training staff
- Centres of lifelong learning and centres of practical training and education: a fourth of trainers
- Language schools: nearly a fourth of trainers

As shown in the Chart 21, least trainers with certificates of trainer competencies among all the training staff collaborating with firms was recorded among:

- institutions of higher education, which in this case may be related to the (mentioned earlier) problem of counting all the faculty of the given institution into the total number of training staff. Yet it may also point to the fact that offering training and postgraduate studies, institutions of higher education more often collaborate with their own faculty, that is lecturers, who are not required to have certificates of trainer competencies. Moreover, the lecturers who do not find being a trainer the main profession may not be interested in the acquisition of such certificates.
- In the vocational training and education centres: in their case, trainers with certificates of trainer competencies account for 17% of the total number of trainers.

Chart 21

The percentage of trainers with certificates of trainer competencies among all training staff employed



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

To complement this information, it is worth adding that, in public units, trainers with certificates of trainer competencies account for 15% of all the trainers collaborating with such an institution, while in the private companies this ratio amounts to 29%, i.e. is nearly twice as high. As has been mentioned earlier, this information must be interpreted carefully due to the problems with the understanding of the term "certificate of trainer competencies".

4.4. Clients of training institutions and firms

The question about the type and number of clients of training firms and institutions was used not as much to obtain precise reporting information about participants of training, but rather to estimate the scale of operation of the given institution or firm. The number of clients – besides the volume of employment, number of trainers employed, and the turnover of the firm – was treated as an index of its market position. Nevertheless, information about the number and types of clients using the services of the firm is in itself sufficiently important to be presented here, at least briefly.

The decided majority of the training firms and institutions surveyed provide services both to individual and institutional clients (65% of the respondents), 21% – only to individual clients, and 14% – only to institutional ones. The number of firms offering their services only to individual clients include primarily driving schools (49%), institutions of higher education and their units (27%). The number of firms offering their services only to institutional clients includes primarily consulting and training firms (24%).

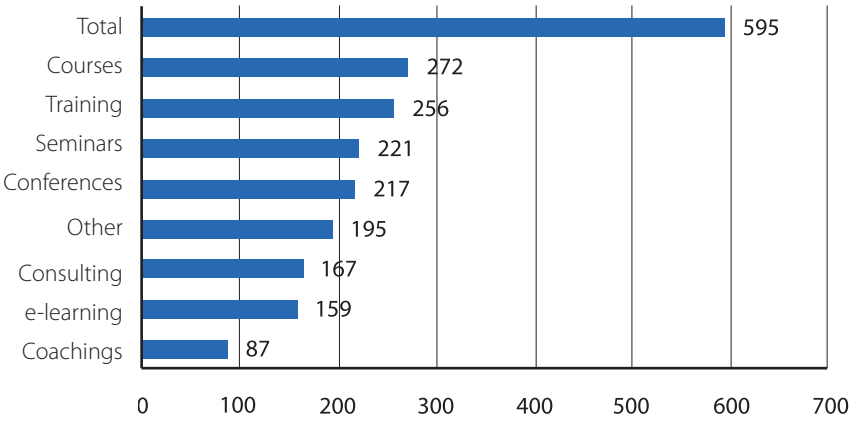
Individual clients

On average, in 2010 each of the training institutions and firms surveyed trained 595 individual clients. Every other of them trained fewer than 240 clients, and each of the remaining 50% – more than 240. The value quoted most frequently was 100 clients. The largest number of individual clients was recorded in 2010. Among institutions situated in the eastern supra-region (average: 662, median: 260), followed by the southern (average: 643, median: 250) and central (average: 576, median 240), further in the north-western (average: 567, median: 210) and northern (average: 543, median: 240) supra-regions.[24] The lowest number of individual clients were recorded in the case of firms and institutions situated in the south-western region (average: 537, median: 213).

Information concerning the average number of clients trained in individual types of courses is presented in the Chart 22. As can be seen, on average, most individual clients received trained in the form of courses, not many fewer in training, seminars and conferences, and the lowest number of clients was covered by coaching.

Wykres 22

The average number of individual clients of training institutions, total and broken down by the offered forms of education and training[25]



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

24 Due to too small counts in individual administrative regions (voivodeship), in case of some analysis division into six regions was used. The central supra-region consists of Łódzkie and Mazowieckie administrative regions; the southern supra-region – Małopolskie and Śląskie; the eastern supra-region – Lubelskie, Podkarpackie, Podlaskie and Świętokrzyskie; the north-western supra-region –Wielkopolskie, Zachodniopomorskie, and Lubuskie; the south-western supra-region –Dolnośląskie and Opolskie, and the northern supra-region –Kujawsko-Pomorskie, Warmińsko-Mazurskie and Pomorskie.

25 The category "other" includes predominantly workshops, postgraduate studies, and private tuition.

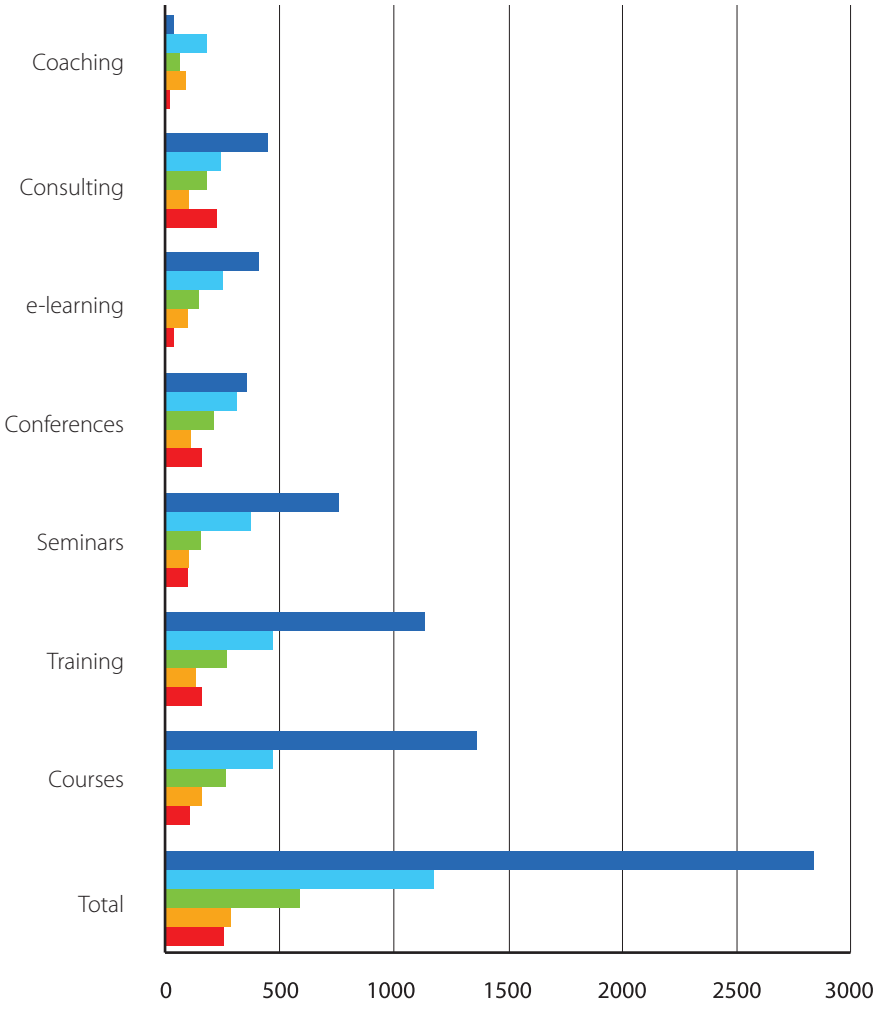
Clients of training institutions and firms

Understandably, in nearly every form of training and education, most clients were trained by large firms, followed by medium-sized, small, and micro enterprises, with the exception being consulting, where one-person companies served more clients then micro- and small businesses, and nearly as many as medium-sized ones. Detailed information concerning the average number of clients covered by various forms of education is divided by the size of training firm and institutions is presented in the Chart 23.

The Table 9, in turn, presents information about the average number of individual clients covered by various forms of education broken into types of the training firm and/or institution. On average in 2010 most clients use the services of vocational training centres (940), followed by the services of consulting and training firms (743), institutions of higher education (715), and services provided by centres of lifelong learning and centres of practical learning (672). The lowest average number of clients was registered in driving schools – 347 people per annum, which, however, results predominantly from the size of these firms, of which 7% are one--person firms, and 75% – micro-businesses.

Chart 23

The average number of individual clients of training institutions, total and broken down by types of education and size of the firm



	Total	Courses	Training	Seminars	Conferences	Online courses	Consulting	Coaching
Large	2844	1362	1132	751	351	402	439	29
Medium-sized	1172	465	468	372	307	247	235	180
Small	591	262	263	149	210	140	174	60
Micro	286	156	125	100	104	93	99	87
One-person	260	109	148	91	156	29	221	14

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Table 9

Clients of training institutions and firms

Average number of individual clients in training institutions, total and broken down into forms of education[26]

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm
Courses	384	264	384	205	248	230	268
Training	102	310	377	325	144	247	288
Seminars	105	177	313	142	83	176	289
Conferences	115	252	193	265	88	243	204
Total average number of individual clients	480	672	940	715	347	520	743

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Institutional clients

The representatives of training firms and institutions covered by the study declared that in 2010. They had on average 79 corporate clients (businesses, institutions, with every other one of them having up to 19 clients, and the remaining 50% – more than 19). In most cases, the training firms surveyed had two institutional clients. The highest number of such clients (on average 116) were registered in the case of vocational training centres, followed by consulting and training firms (average 105), institutions of higher education, training firms other than language schools and driving schools (average: 78), centres of lifelong education and centres of practical training (average: 51). Lowest average number of institutional clients was present in language schools (40) and driving schools (14): see: the category "total" in Table 10).

It can be clearly stated that a number of institutional clients using the services of a training firm is strongly related to the size of the firm: representatives of one-person firms declared providing services to 22 corporate clients on average, of micro-businesses – 38, small businesses – 87, medium-size enterprises – 114, and large ones – 334. What is not obvious, however, is the differentiation of the number of institutional clients due to the region where the firm has its seat: on average, the highest number of such clients was recorded in the case of businesses situated in the eastern supra-region – 104, followed by the central– 89, southern– 74, northern – 69, and south-western supra-region – 67. The least number of clients of the type was declared by the representatives of training firms from the north-western supra-region region – 63.

The surveyed training firms and institutions in most cases provided services to the following types of corporate clients (see: Chart 24):

- Businesses: having businesses among other clients in 2010 was declared by 61% of the training institutions and firms surveyed
- Public institutions other than employment offices – 49%,
- Employment offices – 38%,
- Non-governmental organisations – 30%.

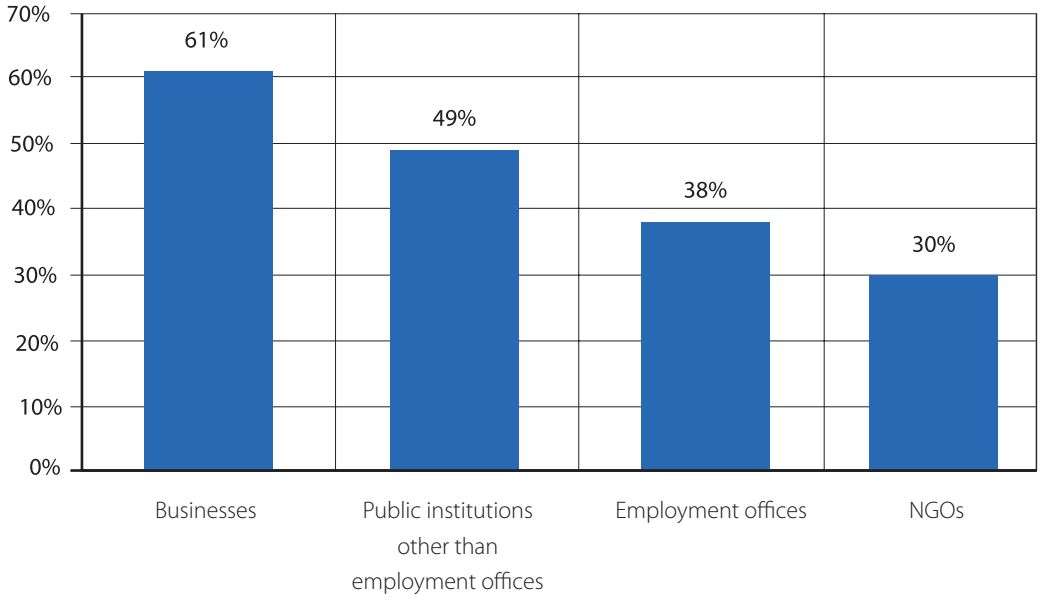
On average, the institutions surveyed provide services to two types of corporate clients. In 2010, only 22% of training firms had institutional clients of only one type (in most cases, they were businesses), and 40% provide services to 3 or more types of corporate clients.

26 The table does not account for teacher colleges and foreign-language teacher colleges due to their small count in the sample, as only 13 of such enterprises were covered by the study.

Clients of training institutions and firms

Chart 24

The percentage of training firms declaring various categories of institutional clients in their client base



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Table 10

Average number of clients of training firms in 2010, broken down by client type and training institution type

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm	Total
Businesses	41	44	98	42	13	72	88	69
Employment offices	2	6	16	6	4	9	16	10
Public institutions other than employment offices	4	20	46	45	4	28	28	26
Non-governmental organisations	5	6	25	43	3	27	21	21
Misc.	2	31	102	150	15	49	52	51
N	40	51	116	80	14	78	105	79

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

4.5. Quality supporting activities in institutions services sector

Efficiency of training activity, i.e. achievement of the effect being the acquisition of new competencies and/or development of the competencies held is directly influenced by the quality of the training offered. This quality in turn is influenced by a great number of factors, including ones that have been discussed earlier: knowledge, skills and motivation of the training personnel, appropriately selected method of training, conditions in which the training is provided, adjustment of the level of training, the skills and expectations of its participants, appropriate time devoted to the training, and many others that cannot be discussed here, as the question of training quality is as extensive as complex. Being aware of this complexity, and at the same time eager to acquire at least basic information concerning the actions that serve the improving of the services provided in the training sector, representatives of the surveyed institutions were asked a number of questions related to the quality policy they conduct or absence thereof. Due to the requirement of limiting the number of questions in the questionnaire, the questions asked concerned only selected aspects of quality supporting actions, among which the following were accounted for:

1. Actions related to the acquisition of an external corroboration of quality of the services provided and also association or participation in collaboration networks that is:
   a) accreditation or quality certificate of the training firm or institution
   b) plan to apply for an accreditation or quality certificate
   c) membership in associations and/or chambers, membership in partnerships and networks gathering representatives of the training world.
2. Internal actions aimed at improving the quality of the services provided, among which attention was turned to:
   a) the evaluation of the courses and classes conducted, and the manner of using the results of evaluation
   b) actions aimed at the development of trainer skills
   c) planned actions related to the improvement of quality of the services provided.

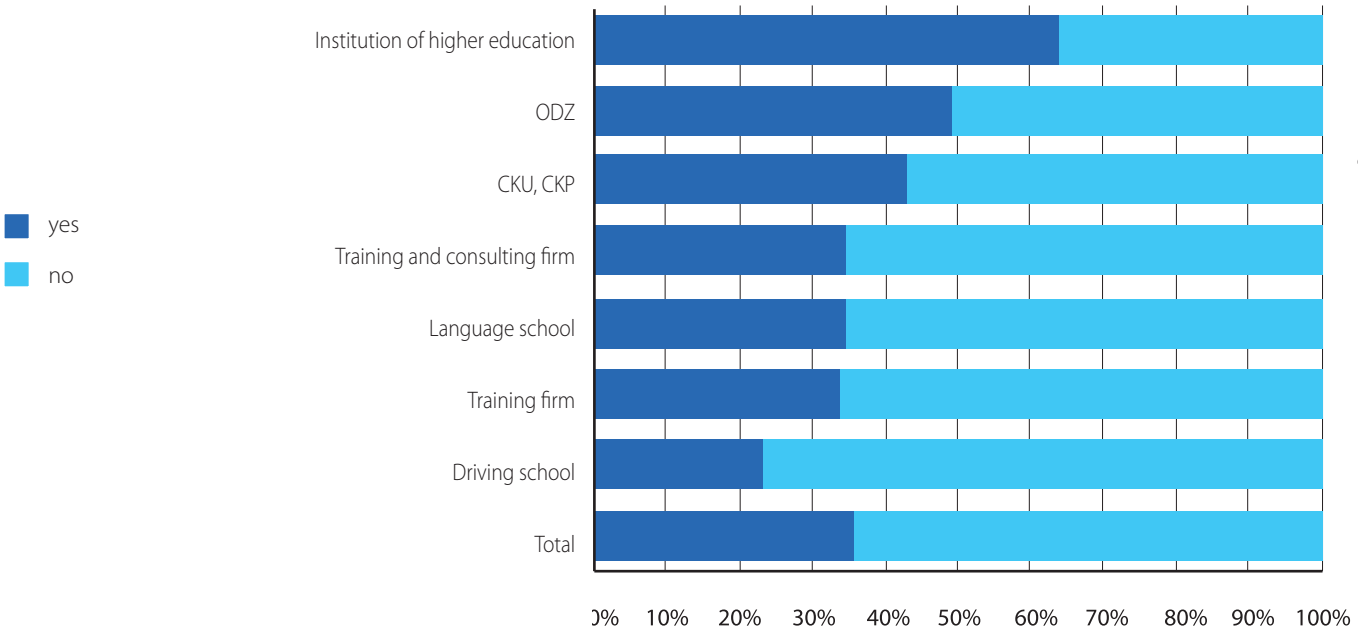
Accreditation and quality certificates in training firms surveyed

Possession of a quality certificate or accreditation was declared by 36% of the training firms and institutions[27] who responded (see: category "total" in the Chart 25). The fact of possession of accreditation and/or quality certificate is declared most often by representatives of units of institutions of higher education, vocational training centres, lifelong learning centres, and practical training centres. Larger proportion of certified bodies among these may be explained by the character of their operation, including – as in the case of institutions of higher education – the obligation to be accredited with the State Accrediting Committee (Państwowa Komisja Akredytacyjna).

27 It is worth adding that according to the RIS report of 2007, such certificate was declared by only 16% of the institutions that entered the register. The reason for such a large difference may be: first – a different population covered by the study (all training institutions), and not only those that make the voluntary registration with RIS, secondly – by how the question was asked (the question in the BKL Study concerned any certificates, even though examples of such certificates were quoted, much like in RIS), thirdly – by a different survey technique, namely telephone interview, in which the respondent might have found it harder to consider the meaning of the term "certificate" or "accreditation" at his or her ease.

Chart 25

The percentage of training firms and institutions declaring having accreditations and/or quality certificates (N=4502)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

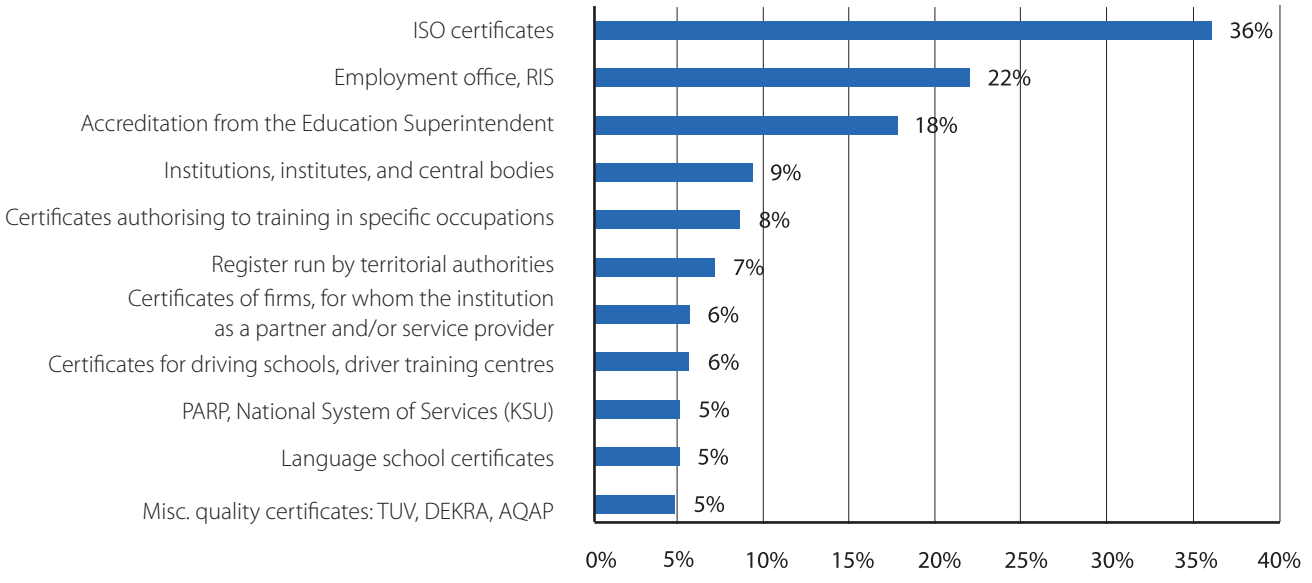
How differently the notions of "certificate" and "accreditation" can be construed is seen for example from the answers given by the respondents who declared that the institution or firm they represent holds a certificate or accreditation to the open question about the precise type of accreditation of certificates they meant. Categorised answers to these question are presented in the Chart 26. To make the information clearer, only those among the listed types of certificates and accreditations are included that were mentioned by 5% or more institutions answering the question.

Most frequently mentioned were ISO certificates that were referred to by 36% of institutions declaring having any certificates, yet what ranked second was the entry into the Register of Training Institutions (RIS) named as a type of accreditation by 22% of respondents to this question. The following types of accreditations and/or certificates do not cause reservations, yet the less frequently mentioned categories included for example the Polish Chamber of Training Firms as an accrediting body.

Worth paying attention to are the types of certificates that given types of training firms and institutions hold. As shown in Table 11, ISO certificates are held most frequently by vocational training centres, consulting and training firms, centres of lifelong education and centres of practical training, and training firms. Accreditation from the Education Superintendent is in most cases declared by language schools, vocational training centres, and practical training centres. Entry into the register of institutions of education managed by the territorial authorities is declared by institutions of higher education, and language schools, understandably, declare most frequently quality certificates adequate for language schools.

Chart 26

Declared types of accreditation and quality certificates held by training institutions and firms (N=1509)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Tabla 11

Types of accreditation and quality certificates declared by representatives of individual types of training firms and institutions

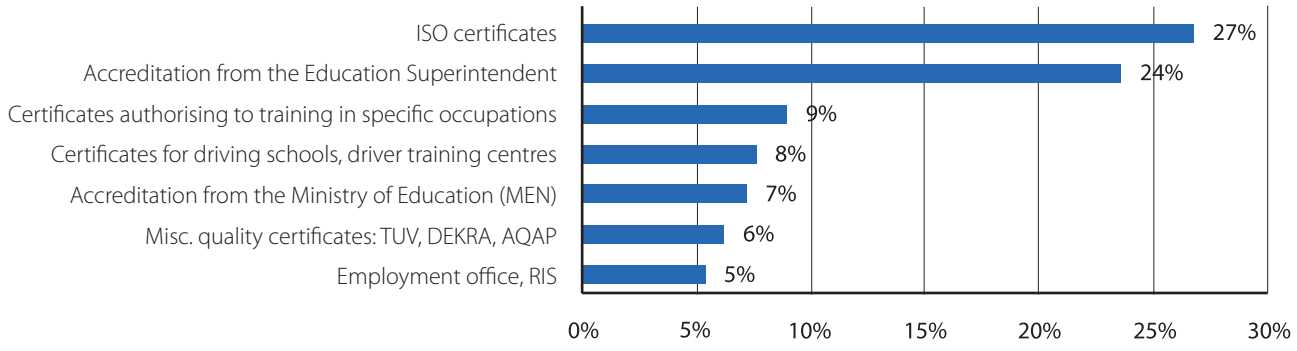
	Language school	CKU, CKP	ODZ	Institution of higher education	Training firm	Training and consulting firm	Total
ISO certificates	6%	39%	50%	18%	36%	41%	36%
Employment office, RIS	15%	19%	16%	9%	25%	31%	22%
Accreditation from the Education Superintendent	31%	31%	31%	5%	17%	8%	19%
Institutions, institutes, and central bodies	0%	17%	17%	4%	9%	7%	10%
Certificates authorising to training in specific occupations	1%	14%	11%	4%	10%	7%	9%
Register run by territorial authorities	7%	6%	7%	27%	7%	5%	7%
Certificates of firms, for whom the institution as a partner and/or service provider	4%	2%	4%	0%	7%	8%	6%
Certificates for language schools	51%	3%	0%	4%	3%	1%	5%
Misc. quality certificates: TUV, DEKRA, AQAP	6%	3%	10%	5%	5%	3%	5%
PARP, National System of Services (KSU)	0%	1%	2%	4%	2%	14%	5%
N	106	193	213	55	397	347	1281

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Quality supporting activities in institutions services sector

Chart 27

Types of accreditation and certificates that training firms and institutions intend to apply for in the coming year (N=1114)

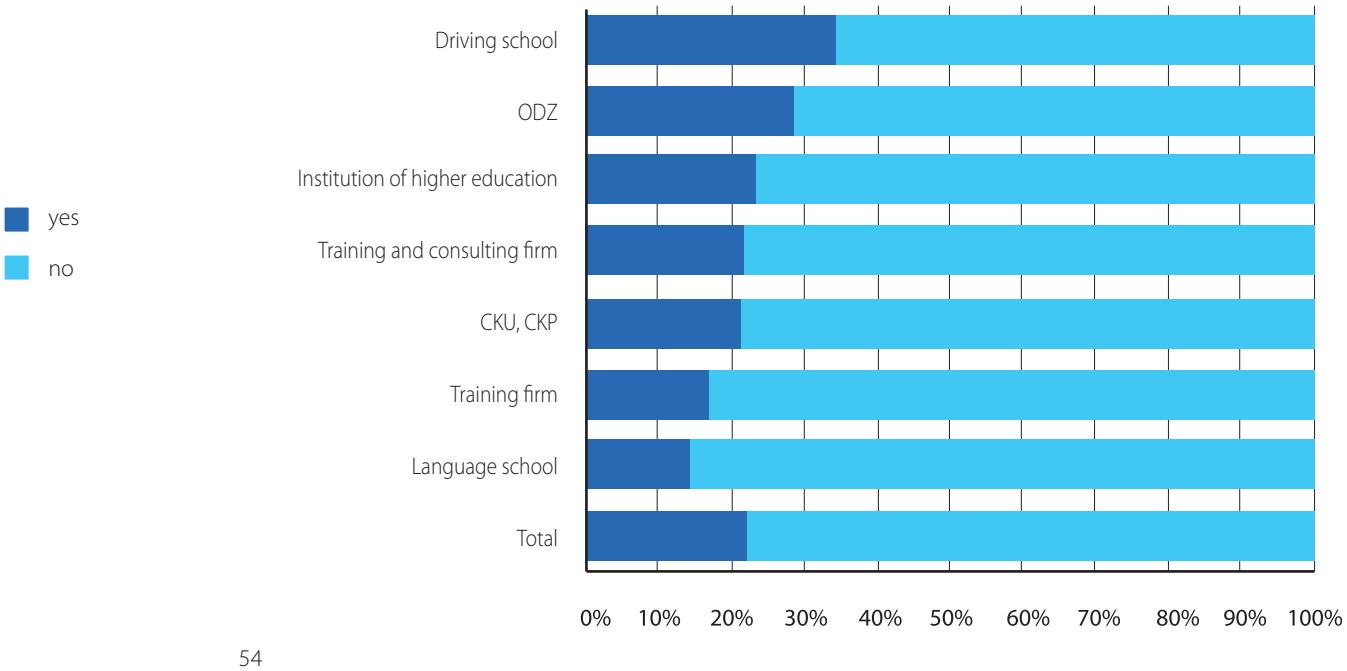


Source: *BKL Study – Study of Training Firms and Institutions* 2010.

The last question concerning external activities aimed at improving the quality of work of institutions and corroborating that quality is the membership of the training firm or institution in associations, chambers, and other organisations and/or networks gathering representatives of the training sector. Asking the question about membership, it was assumed that it is an index of the institution's or firm's intention to collaborate with its environment, and is an expression of the eagerness to share own experience and use the experience of other firms and institutions operating within the same area, which is why it is considered an important factor contributing to the development of the institution. The declarations of the respondents proved that 22% of the training firms and institutions surveyed belong to a chamber, association, and/or partnership. Most often such declarations were made by representatives of driving schools, vocational training centres, institutions of higher education, training and consulting firms, lifelong education centres, and centres of practical training. This information is presented in the Chart 28.

Chart 28

Membership in chambers, associations, and/or partnerships among training firms and institutions (N=4502)



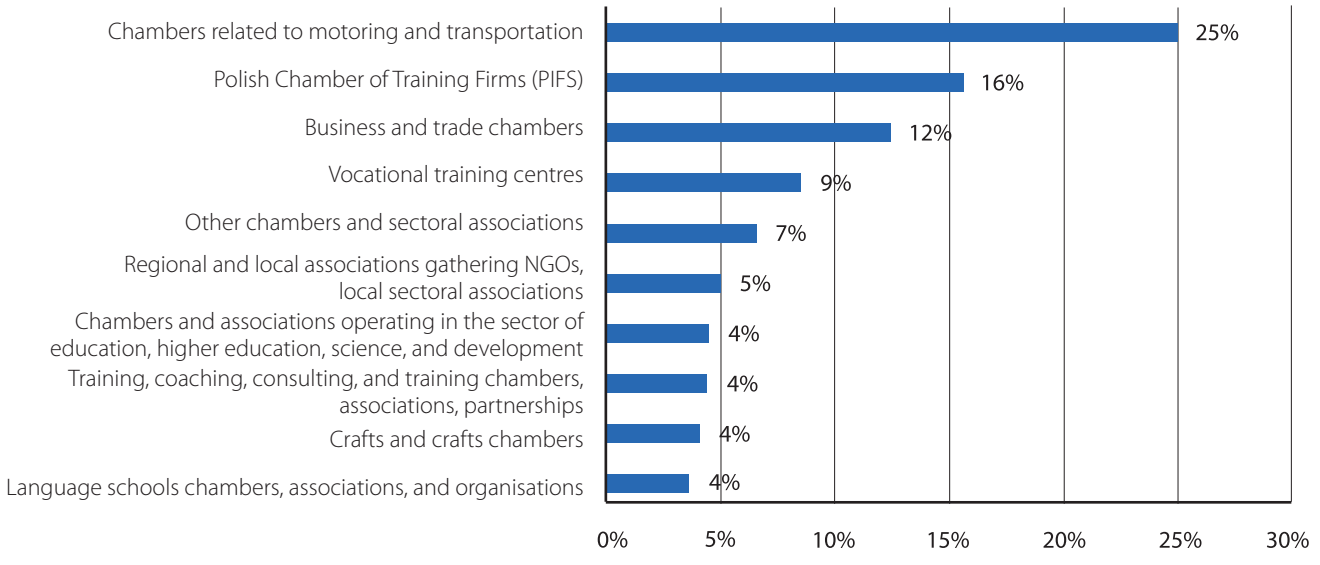
Source: *BKL Study – Study of Training Firms and Institutions* 2010.

The highest number of the training firms and institutions surveyed that declare membership in a chamber, organisation, and or association belong to chambers, and associations related to motoring, and transport (25%), 16% belong to the Polish Chamber of Training Firms, and 12% – to various trade, industrial, and business chambers. Information concerning organisations whose membership was declared by at least 4% of the respondents to this question is presented in the Chart 29.

Quality supporting activities in institutions services sector

Chart 29

Chambers, associations, and organisations that the training firms and institutions surveyed belong to (N=869)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Evaluation of the courses and other forms of training and development offered

More than 9 out of 10 (93%) of training firms and institutions surveyed declare that they evaluate the courses, training, and other pro-developmental activity they provide.[28] The proportion of respondents who declare evaluating their actions is lowest (though still very high: 85%) among one-person firms, higher among medium-sized (96%) and small and large (95% in either case) businesses. Moreover, evaluation is less often used by driving schools than by the remaining types of institutions. Representatives of driving schools did not probably consider the fact that the results that participants of the courses obtain at the driver licensing exam are a form of assessment of the courses. As far as the type of the tuition offered is concerned, most frequently evaluated are: coaching (98%), conferences (97%), and seminars (96%).

Methods of evaluation used

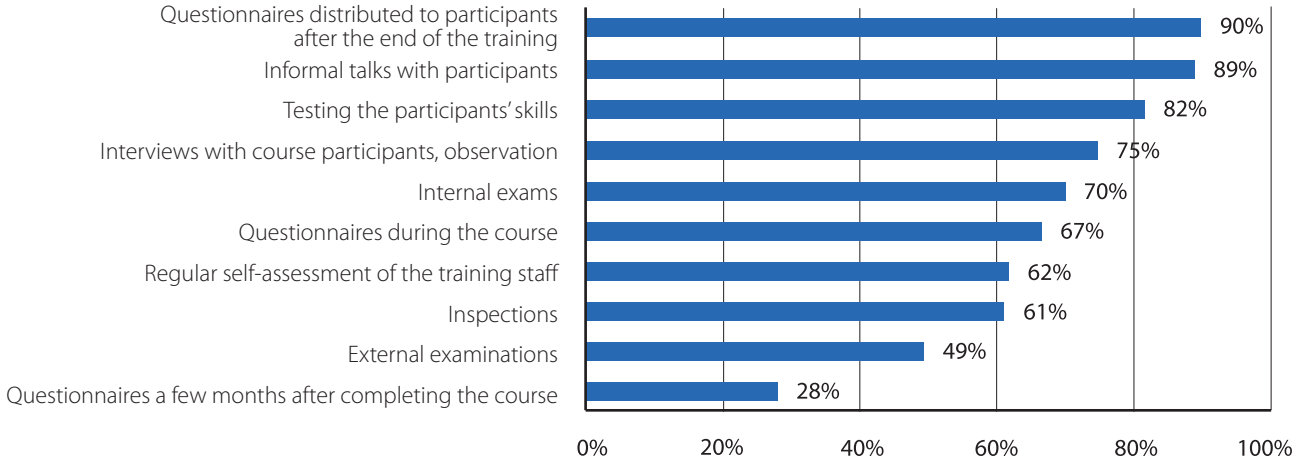
As results from the declarations of representatives of training firms and institutions, they apply a variety of methods of evaluation in the quality of the courses and activities they conduct (see: Chart 30). The evaluation tools most often in use include:

- Questionnaires distributed to participants after the end of the training
- Informal talks with participants
- Testing the participants' skills
- Interviews with course participants, observation
- Internal exams.

28 Although we do not have at our disposal comparative data in the strict sense of the term, i.e. the results of studies conducted in the same manner, with the same tool, and on the same population to provide a general point of reference, it is worthwhile to quote the results of a study conducted in Małopolska in 2007, where the percentage of respondents declaring evaluation of the activities they conducted amounted to 86%. Even though, as has been mentioned, this data cannot be compared directly, it can point to the popularisation of the culture of evaluation among the training institutions operating in Poland. See: Górniak et al. 2007. *Kształcenie ustawiczne w Małopolsce w opiniach przedstawicieli instytucji działających w obszarze kształcenia ustawicznego. Raport z piątego etapu badań naukowych: badania ilościowe*. Kraków: WUP.

Chart 30

Methods of assessment of courses, and other forms of training used by training firms and institutions



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Interestingly, fewer than 1% of the institutions declaring evaluation of their activities listed only one form of such assessment, e.g. questionnaires distributed to participants after the completion of a course. On average, institutions make use of seven different methods of assessing the activities, with every other institution using up to seven different methods, and every other – more than seven. Highest variety of forms of activity assessment is present in language schools, and relatively smaller – in consulting and training, and training firms. This nevertheless results from the specific characteristics of the operation of these firms. It is so as they can provide services in whose case the effects of training are not evaluated through examinations, which by definition excludes the use of this form of evaluation to assess the efficiency of consulting or training. As is easy to guess, more varied methods of evaluation are used by large (on average 8) and medium-size (7) enterprises than is the case with micro- (6) and one-person (five) businesses using relatively fewer evaluation tools.
Types of the tools used for the assessment of courses by various types of institutions are an interesting element in characterising them. Such a differentiation is shown in Table 12. As can be seen, driving schools do not use evaluation questionnaires and inspections as often as other types of training institutions, while – which is understandable – they run internal examinations more often than others. Evaluation questionnaires are used most frequently in institutions of higher education, consulting and training firms, practical training and training centres and lifelong learning centres, and training firms other than language schools and driving schools.

Table 12

Methods of evaluation of training offered by various types of training firms and institutions

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm
Questionnaire closing the course	86%	94%	93%	98%	60%	93%	97%
Questionnaires, a few months after completing the course	25%	22%	30%	33%	18%	29%	35%
Questionnaires during the course	76%	66%	70%	72%	43%	68%	72%
Interviews with participants of the courses, observation of the course of education	84%	78%	78%	67%	73%	73%	74%
External examinations	58%	59%	64%	50%	81%	44%	34%
Internal examinations	85%	80%	82%	67%	95%	67%	55%
Informal talks with participants	92%	86%	90%	88%	88%	88%	90%
Regular self-assessment of the training staff	72%	60%	65%	62%	71%	60%	60%
Inspections	86%	71%	72%	75%	50%	57%	54%
Testing the participants skills/ knowledge	94%	85%	83%	79%	90%	80%	78%
N	303	449	428	92	480	1098	991

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

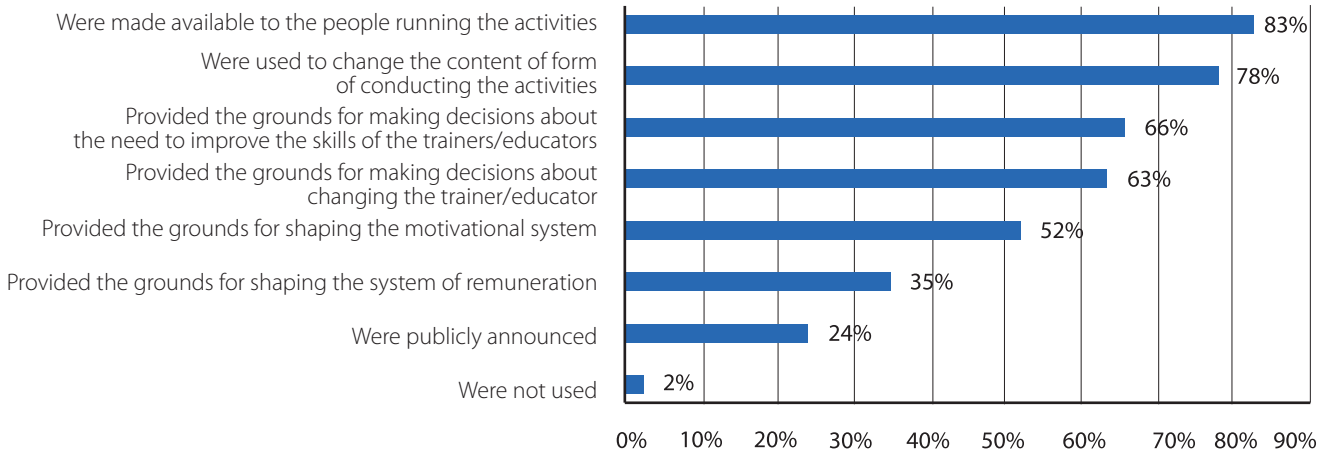
Evaluation of the training conducted is a significant action aiming at the improvement of the quality of education, nevertheless, it should not end with nothing more than collection of information and its analysis. The data gathered should provide the basis for actions aimed at the improvement of the quality of the services provided. Therefore, the training institutions and firms surveyed were asked how they use the results of assessment of the activities they conduct. According to the declarations of the respondents, the results of assessments primarily (Chart 31):

- were made available to the people running the activities
- were used to change the content of form of conducting the activities
- provided the grounds for making decisions about the need to improve the skills of the trainers/educators
- provided the grounds for making decisions about changing the trainer/educator
- provided the grounds for shaping the system of motivation in the firm or institution.

Quality supporting activities in institutions services sector

Chart 31

Manners of using the results of activity assessment by training institutions



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Notable differences in the declared ways of using the results of assessment of the activities among various types of institutions are as follows:

- Results of the assessment of activities in the shaping of the remuneration system are most often used by driving schools (50%) and language schools (44%).
- Language schools use the results of assessment of activities to make decisions about changing the educator more often than other types of institutions.
- Training and consulting firms make the results of the assessment the grounds for changing the content or form of the activities somewhat more often than others.
- The popularity of each of the forms of using assessment results grows slightly parallel to the size of the training firm.

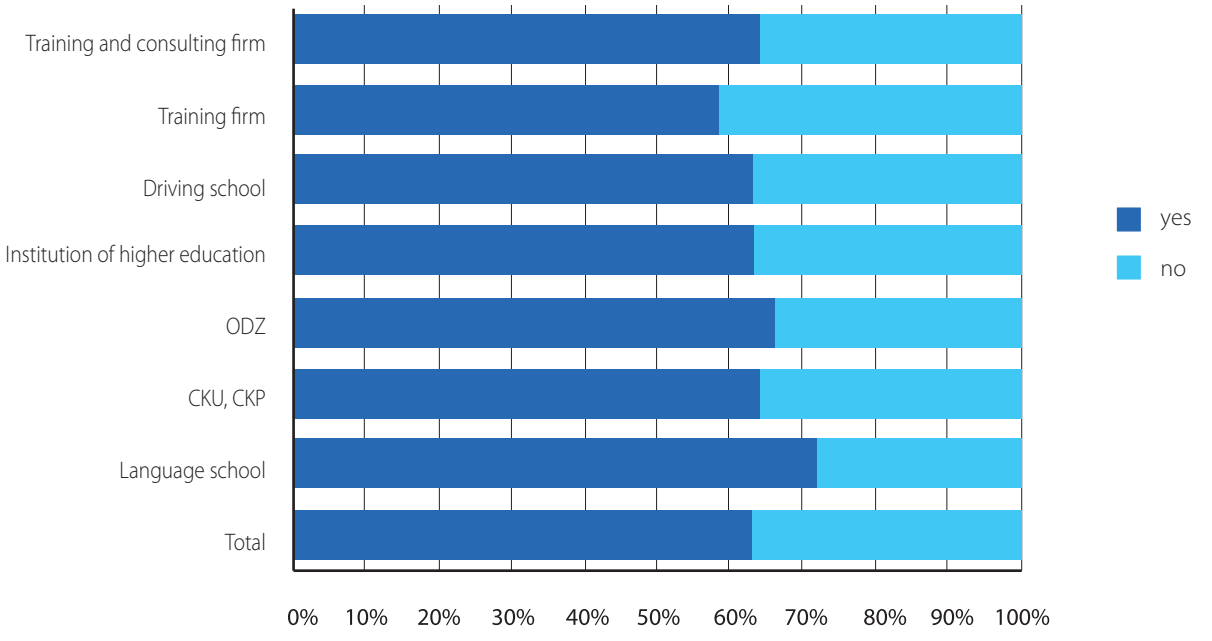
Improving the competencies of the training staff

As far as everyone must take additional education and care for development to meet the occupational challenges, and be able to use the achievements of new technologies in everyday life in the face of the quick technological, social, and cultural changes, these requirements must be even greater in the case of trainers and educators, as they are the ones who are to shape the desired competencies and show the directions of development – in a word: to be the leaders of investment in human capital. This is why the question to what extent training firms and institutions support the process of improving the quality of the training staff remains a significant question.

An analysis of the answer to the question whether the given training firm or institution undertook any activity serving the development of trainer skills during the preceding year shows that, in line with the declarations of the respondents, such actions were undertaken in 63% of the firms. Differences between the types of institutions were very little in this case: such activities were most frequently declared by representatives of language schools, and least often – by training firms other than driving schools and language schools (see: Chart 32).

Chart 32

Were any activities serving the development of trainer skills undertaken in your firm or institution in 2010? (N= 4502)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

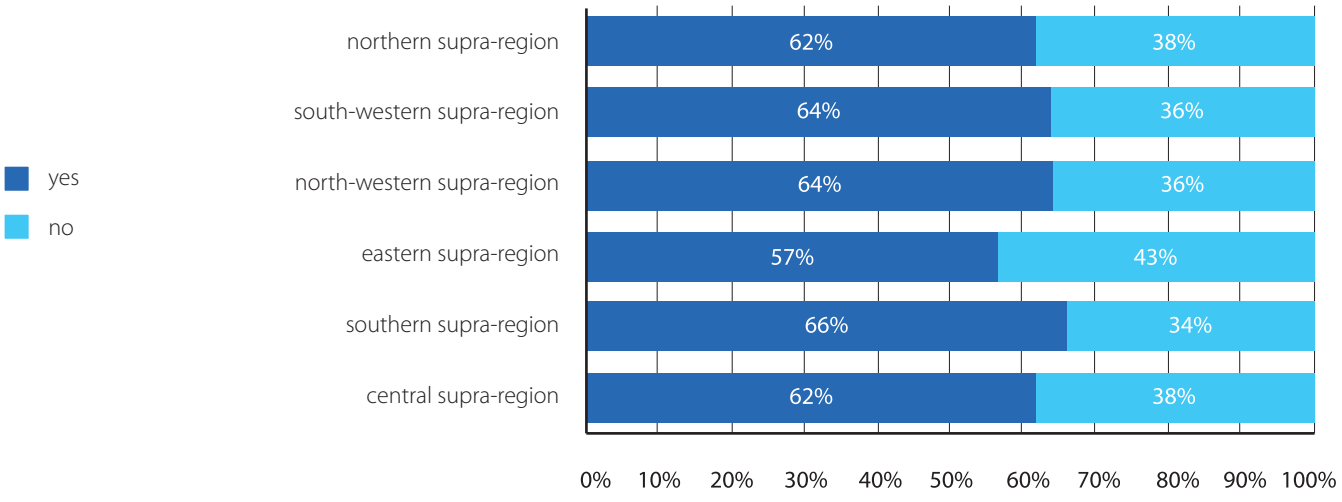
There is not much surprise in the fact that the large firms and institutions are somewhat more often involved in the development of trainer competencies than the small ones. As the results of research proved, the percentage of respondents declaring engaging in activities aimed at the improvement of the skills of trainers among large enterprises amounts to 80%, medium-sized – 66%, small – 64%, micro- – 6%, and one-person businesses, whose owner is in most cases the trainer or instructor – 57%.

It is worth noting that as far as the region where the firm has its seat is not a distinguishing feature for the results in the case of most questions, in the case of investment in the quality of training personnel, some differences are visible (see: Chart 33). Involvement in the development of the training staff is least often declared in the eastern supra-region (57%), which includes the Lubelskie administrative region, with the percentage of respondents declaring investment in training staff at the level of 50%, being lowest among the administrative regions. The declarations of investment in the training personnel were made most often by representatives of the firms and institutions situated in the southern supra-region (66%), which included the Małopolskie region (with the rate of 66%) and Śląskie (67%).

Quality supporting activities in institutions services sector

Chart 33

Were any activities serving the development of trainer skills undertaken in your firm or institution in 2010? Diversification in answers by the region (N= 4502)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Types of activities that serve the development of trainer skills

Among the most often resorted to activities that are to contribute directly or indirectly to the improvement of the quality of the training staff collaborating with training firms and institutions, the following must be mentioned: internal training (applied by 73% of firms that embark on actions related to the development of trainer skills) and the obligation of the trainers to self-education (67%) (see: the value "total" in Table 13). As far as the first category, even though not fully precise, refers to specific actions that are undertaken by the firms, the second may be mentioned in fact even if no actions are undertaken. It is so as it would be difficult to define what such an obligation to self-education really is, and how to verify the fulfilment of this condition. Used most rarely are the negative sanctions, including removal of the trainer from the course, nevertheless, the use of this instrument was declared by every fourth representative of the training institutions and firms surveyed.

Table 13

Ways of developing and improving trainer competencies used in the training institutions and firms surveyed, total and broken down by the size of the firm

	Micro	Small	Medium--sized	Large	Total
Internal training	62%	78%	80%	88%	73%
Obliging the trainers to self-education	66%	68%	70%	70%	67%
External training, courses, postgraduate courses entirely financed by the institution	44%	39%	47%	57%	43%
Technical training conducted by the providers of the equipment used	32%	42%	59%	69%	41%
External training, courses, postgraduate studies co-financed by the institution	34%	41%	56%	71%	41%
Financial incentives for the learning staff	34%	39%	43%	45%	38%
Non-financial rewards and awards for improvement of occupational qualifications	32%	37%	42%	55%	36%
Removal from specific courses/training of people who do not improve their competencies	20%	26%	29%	38%	25%

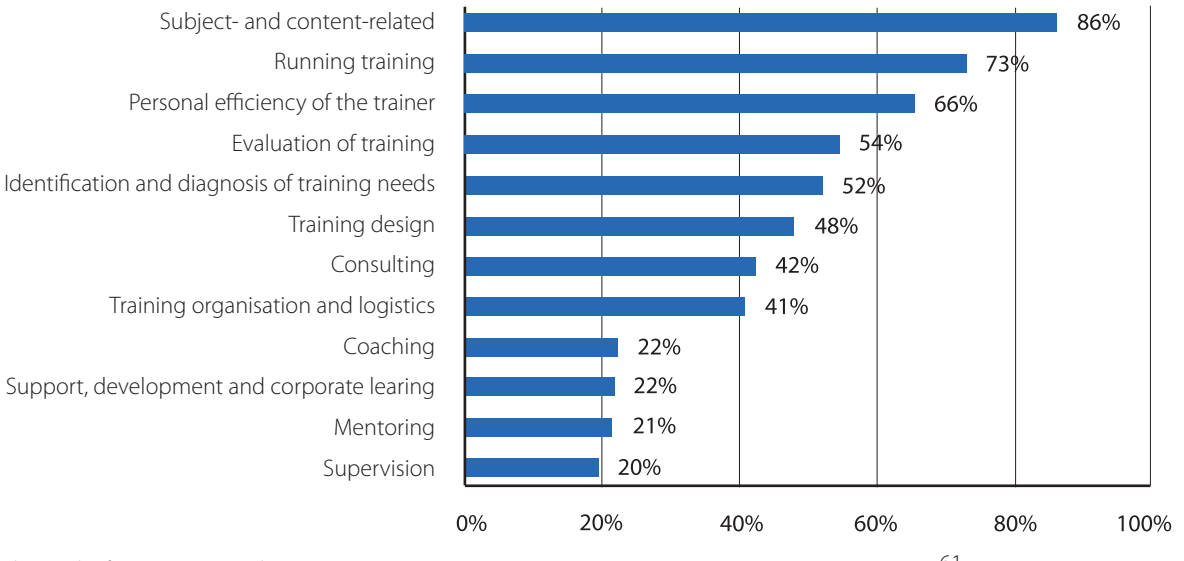
Source: *BKL Study – Study of Training Firms and Institutions* 2010.

As the data provided in Table 13 proved, nearly all forms of developing trainer skills are more often used in large, medium, and small businesses, and more rarely – in micro-enterprises, with the only exception being the obligation of the trainers to self-education, yet, as has been mentioned earlier, this category causes numerous interpretative problems.

The training staff acquires additional education mostly in the field in which they provide training or consulting, therefore, a specialist in labour law would receive additional education precisely in this field. In more than 7 out of 10 institutions that are involved in any way in the development of the competencies of the personnel, training of the trainers concerns the running of training itself, in 66% of institutions – the methods of increasing the personal efficiency of the trainer, in 54% – evaluation of training, and in 52% – identification and diagnosis of training needs. The categories mentioned least often include mentoring and supervision (see: Chart 34).

Chart 34

Areas of development of competencies of the training staff



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Quality supporting activities in institutions services sector

As far as the subject range of the training for trainers is concerned, there are no major differences between the firms and institutions surveyed: neither the size of the firm nor its type influence the subject range.

Planned activities serving the improvement of quality of the services provided

The last of the elements taken into account in the analysis of the pro-quality actions applied by training firms and institutions were the plans concerning future activities capable of contributing to the improvement of the quality of the services provided. The representatives of training institutions and firms were asked whether they intend to engage in any actions aimed at the improvement of the quality of services during the coming year. The institutions that provided a positive answer were additionally asked about the actions they intend to engage in. The picture emerging from the answers to these questions is very positive, if not downright optimistic.

No fewer than 84% of the training firms and institutions surveyed, declared that during the coming 12 months they intend to engage in actions aimed at the improvement of the quality of the services provided. Answers to these questions did not differ significantly by the type of institution or its size. The level of the declared intention to improve the quality of the services provided is thus equally high among all the training firms and institutions surveyed.

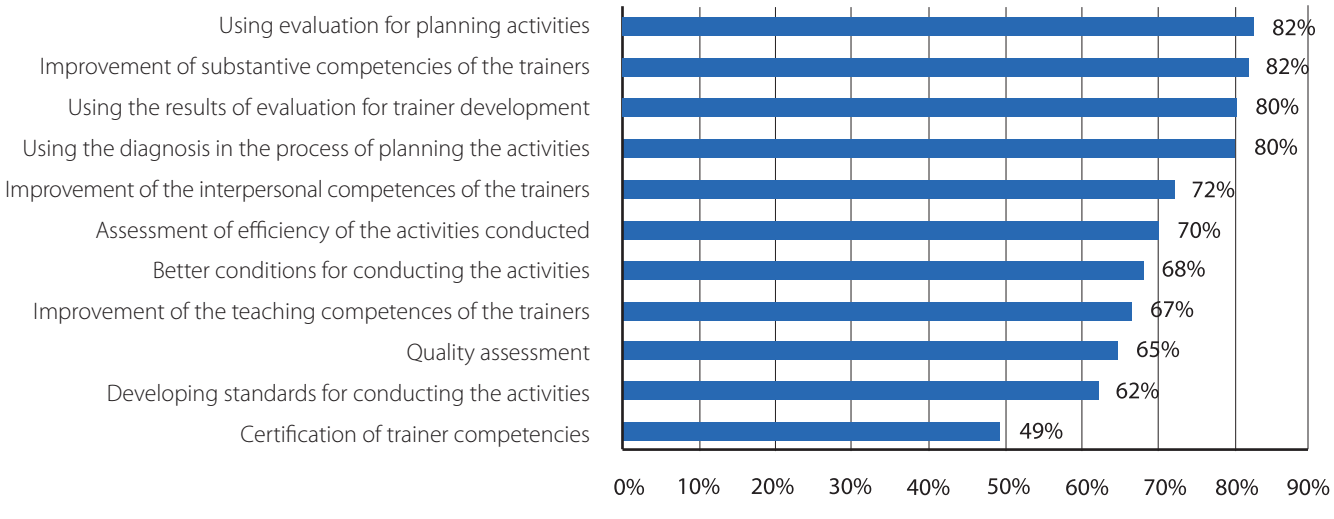
The most frequently mentioned pro-quality activities planned included:

- usage or better usage of the results of evaluation in planning the activities
- improvement of substantive competencies of the trainers
- using the results of evaluation for trainer development
- using the diagnosis of training needs in the process of planning the activities
- improvement of the interpersonal competences of the trainers
- assessment of efficiency of the activities conducted.

All these actions were mentioned by 70% and more people answering the question about the character of the planned involvement in the improvement of the quality of the services provided. Relevant, detailed information is presented in the Chart 35. Worth adding is the fact that as far as the planned pro-quality activities are concerned, the various types of training firms and institutions surveyed hardly differ one from another. The character of the planned actions differs neither by the type of institution, nor by its size, situation, or time in the market.

Chart 35

Planned actions serving the improvement of quality of the services provided (N= 3443)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

4.6. Development of training institutions and firms, and barriers therein

The study of training firms and institutions covered as part of the Study of Human Capital in Poland is aimed primarily at the description of these institutions, examining the services they offer, their human resources, scale of activity measured by the number of clients, forms of education offered, and scope of activity. A somewhat of a by-product, yet of extreme importance, are the prospects of the development of the training sector in Poland. The matter acquires a special significance in the face of the challenges that Polish economy and society are already facing and/or will soon have to face. These challenges are the low level of economic activity of the population, the mismatch between the labour supply and the demand for it, and finally the unfavourable demographic changes, whose consequences in the near future will radically change the Polish labour market. In this situation, training institutions, whose flexibility is greater than that of the sector of formal education, will have an important role to play, namely that of the factor helping to do away with the maladjustment of labour supply to the demand for it. Yet, will the training firms and institutions operating in the Polish labour market be capable of standing up to such a challenge? Will they be capable of any action other than responsive, and therefore being pro-active in reference to the needs of the labour market? Briefly speaking: will they be able to increase the interest in development among those groups of people who have so far undertaken no pro-developmental activity? Even though, judging by the studies conducted, it will be difficult to provide a clear and exhaustive answer to questions posed in this way, and an attempt to explain the problem will be an analysis of the development plans of Polish training firms and institutions, and the barriers that the representatives of the sector believe to impede its growth.

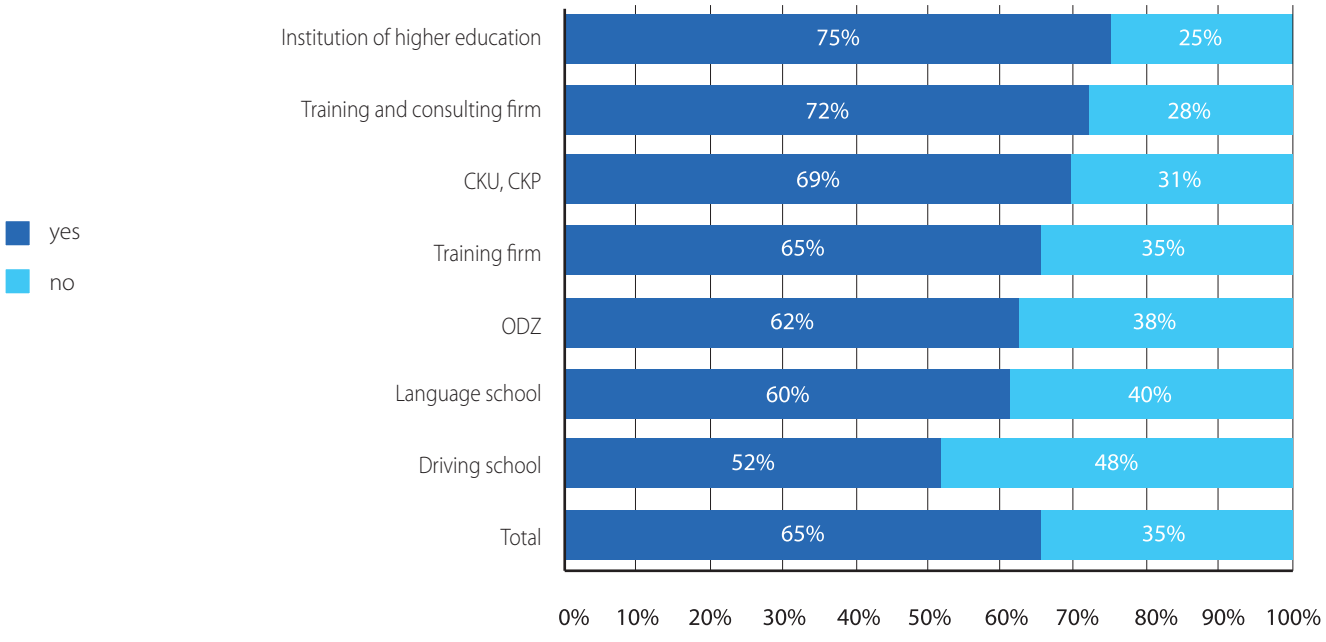
Development related plans in training firms and institutions

The answers of training firms and institutions to the question concerning the development plans allow watchful optimism, or – as the representatives of the sector participating in the consulting meeting at the PARP declared – a stalwart determination and conviction that independent of circumstances, one needs to strive for survival if not development. Expression of such an endeavour for development are of the declarations made by 65% of training institutions and firms surveyed, saying that they intend to expand their activity or engage in some pro-development actions during the coming 12 months. Worth emphasising is the fact that the development plans do not differ by the size of the training firm or institution, with the type of institution being the distinguishing factor only to a small degree. As shown in the Chart 36, declarations of expanding activity were most frequently made by representatives of institutions of higher education and their units, and further – by the representatives of training and advisory firms, lifelong learning centres, and practical training centres. Least often such declarations were made by representatives of driving schools.

Development of training institutions and firms, and barriers therein

Chart 36

Percentage of training firms and institutions planning expansion of their operation
(N= 4490)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Chart 37

Planned activities related to the expansion of operation of the firm or institution
(N= 2830)

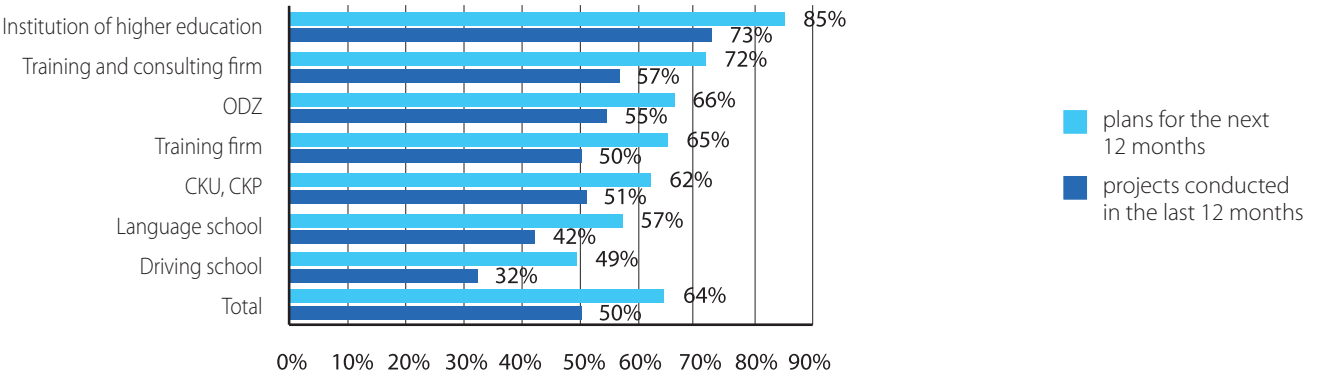
Source: *BKL Study – Study of Training Firms and Institutions* 2010.

The pro-development plans of training firms and institutions are similar in all types of such businesses. In most cases, an increase in employment is planned. In language schools, driving schools, and training and advisory firms, investments in fixed assets and equipment are most frequently planned by representatives of driving schools, lifelong learning centres and centres of practical training, and by vocational training centres. Promotional activities are most frequently planned by representatives of ODZ, CKU, and CKP, even though the differences between them and the remaining categories of institutions are very low.

One of the questions that we asked specifically was the desire to apply for EU funds for financing of the training and services provided during the coming 12 months. Declarations that they will apply for such funds were made altogether by 64% of the training institutions and firms surveyed. Most often, these are the institutions of higher education or their units, and training and consulting companies that intend to apply for EU funds, while driving schools make such applications relatively least often. Even though this information concerns the past and not the future, it is worth adding that every other respondent declared that during the previous 12 months (i.e. effectively in 2010 and the end of 2009) they continued a project related to the development of human resources financed from EU funds. Much like in the case of plans related to acquisition of EU funds for financing training, such projects were in most cases conducted in the not so distant past by the units of institutions of higher education (72% of the category) and least often – by driving schools (32% of the category). The data on conducting projects financed from EU funds in the past, and the data concerning the plans of acquiring these funds in the nearest future for all types of the training institutions and firms surveyed are presented in the Chart 38. Worth noticing is the fact that both in the case of all the institutions surveyed, and of each individual type, the percentage of those who intend to apply for EU funds in 2011 usually exceeds the percentage of those who conducted a project financed from the EU funds in 2010 by more than 10 percentage points.

Chart 38

Has your firm or institution conducted a project financed from EU funds during the last 12 months, and/or does it intend to apply in 2011for EU funds for financing the training or other services you provide? (N= 4124)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Projects financed from EU funds and concerning the development of human resources were conducted in the past and are planned to be conducted far more often by large enterprises than by small and micro ones. Among the large firms the ratio amounted to 71%, among small ones – to 56%, and among the micro--enterprises – to 37%. The situation was similar as far as the plans to apply for funds for financing training are concerned: such declarations were made by 81% of representatives of large, 70% of small, and 56% of micro-enterprises.

Development of training institutions and firms, and barriers therein

Barriers in development of training institutions and firms

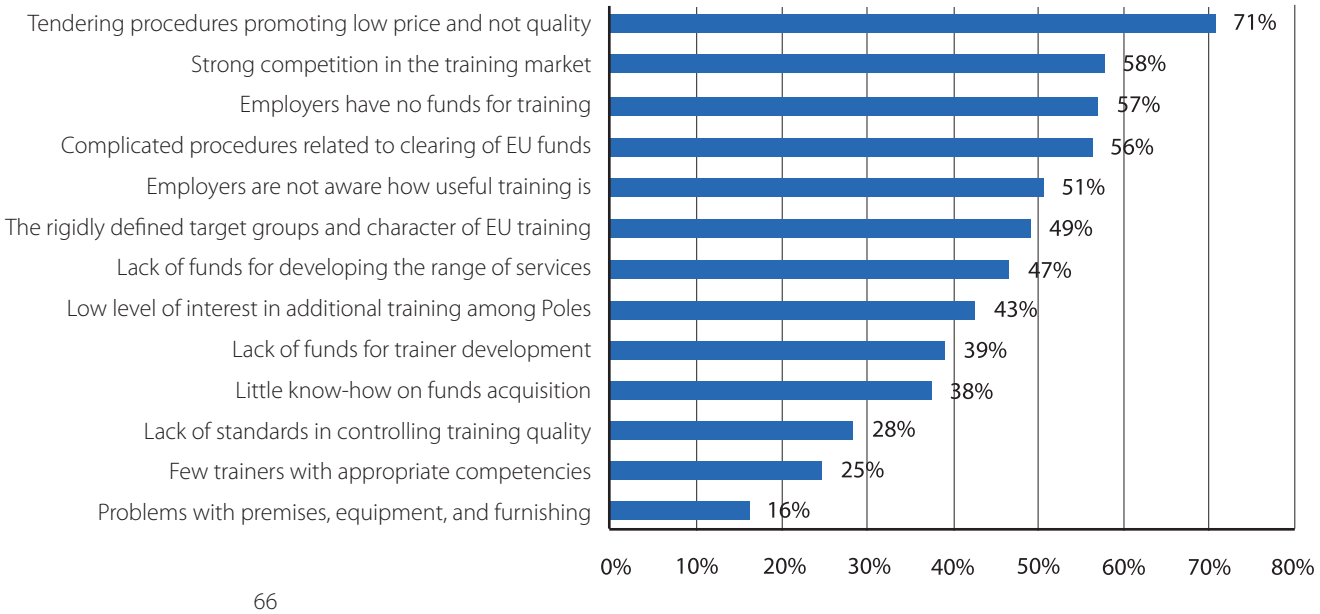
The development of the training market in Poland encounters plenty of barriers of various types. Without doubt, a factor that renders this development more difficult is the very low interest of Poles in the improvement and/or development of their professional competencies, the low level of innovation in Polish economy that does not generate a need for higher competencies, the strategic planning of development of human resources and investment in their development still too infrequently applied in Polish businesses, and finally – and the lack of habits related to development as a goal in itself, understood as expansion of one's horizons and acquisition of new skills that do not have to translate immediately into the improvement of the occupational material situation. Yet beyond doubt all these factors will provide barriers – or rather challenges – for the training sector, whose clients are recruited from about a dozen per cent of adult Poles.

It is interesting, however, how the barriers in the development of the training sector are perceived by its representatives. This is why the training firms and institutions surveyed were asked to assess to what degree the individual factor is presented to them render the development of their operation more difficult. The number of the obstacles accounted for the ones that – in the pre-test studies and consulting meetings with representatives of the training firm milieu – were recognised as potential barriers in the development of the training sector in Poland. The list of these factors was given for the respondents to evaluate, and their answers we used to elicit the ones they believed to account for the worst barriers in the development of the training market in Poland. As shown in the Chart 39, counted among such barriers in the opinion of the respondents are:

- tendering procedures promoting low price and not quality
- complicated procedures related to clearing of EU funds
- financial barriers on the side of the employers, i.e. lack of funds for training in businesses
- strong and (as elucidated in the answers to the open question) destructive competition in the training market
- the rigidly defined target groups and character of training financed from the European Social Fund
- low awareness of the need to invest in human resources on behalf of the employers
- poor economic situation, crisis
- too low financial capital of training firms, lack of funds for the development of the range of training services provided.

Chart 39

Barriers in the development of the training sector in Poland (the percentage of respondents declaring that a given factor renders the development of the training firm or institution he or she represents moderately or highly difficult)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Development of training institutions and firms, and barriers therein

Many problems that are significant for the training sector in Poland were also mentioned in the answer to the open question that was placed at the end of the questionnaire. Even the fact that the question was answered by nearly every fifth representative of the training firms and institutions surveyed is significant and points to the fact that representatives of the sectors were eager to share their comments concerning the conditions of its operation. Similarly important is the subject range of the comments, as a decided majority of those was focused on the co-financing of training services from the ESF. The question of ESF co-financing of training was pointed at as a threat to the quality of training, and claims concerning the actions that should counteract the further deterioration of that quality were made (see: Chart 40). The respondents believe that the reason for the deterioration of quality are the tendering procedures mentioned above and applied for training financed from the European Social Fund, where more attention is paid to the price than to the quality. To acquire co-financing and to win a tendering procedure, the firms are forced to beat down the prices, even if this obviously threatens the quality of education or training on offer.

Moreover, the various comments, claims and remarks spontaneously provided by the representatives of training firms and institutions concerned the simplification of the procedures related to the clearing of the ESF funds, introduction of the regulations concerning the VAT rates, and greater opening of the representatives of public authorities and administration to the needs and challenges related to the problems of lifelong learning.

Table 14

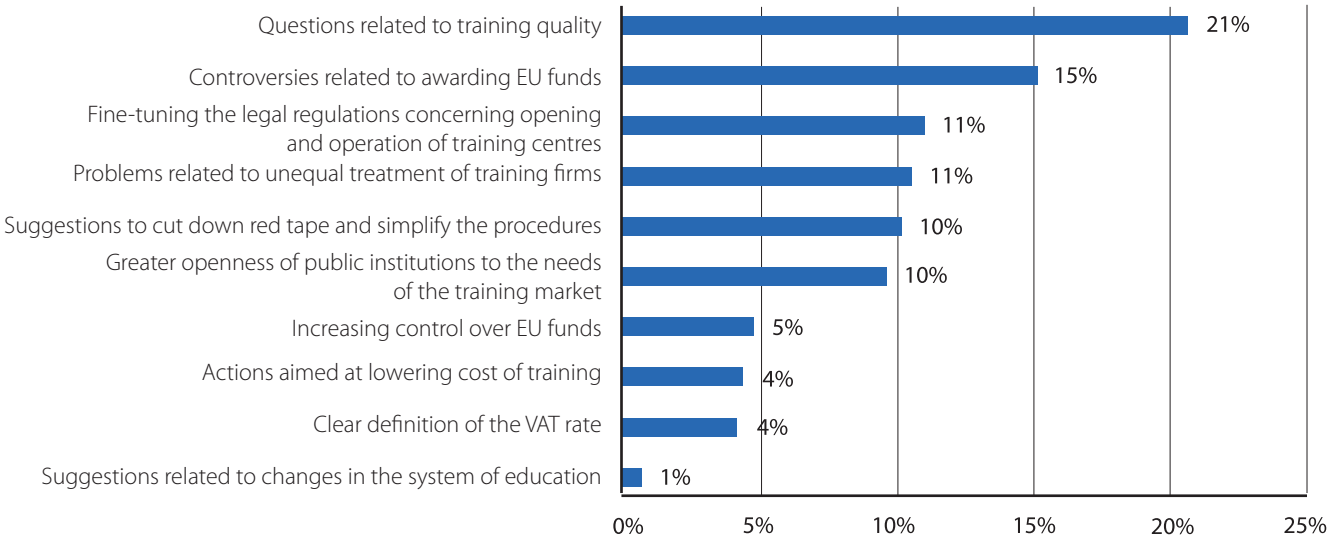
The percentage of training firms and institutions declaring that a given factor renders the development of the training sector in Poland moderately or highly difficult, broken down by the type of training institutions

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm
Tendering procedures promoting low price and not quality	69%	71%	71%	59%	74%	73%	72%
Strong competition in the training market	66%	58%	60%	54%	73%	56%	54%
Employers have no funds for training	62%	59%	57%	52%	49%	59%	61%
Complicated procedures related to clearing of EU funds	61%	59%	57%	49%	58%	57%	55%
Employers are not aware how useful training is	56%	57%	47%	49%	40%	53%	55%
The rigidly defined target groups and character of EU training	44%	51%	50%	53%	43%	50%	51%
Lack of funds for developing the range of services	48%	50%	43%	45%	51%	43%	45%
Low level of interest in additional training among Poles	46%	49%	46%	41%	44%	41%	42%
Lack of funds for trainer development	41%	36%	38%	35%	47%	37%	37%
Little know-how on funds acquisition	39%	37%	35%	35%	56%	39%	30%
Lack of standards in controlling training quality	27%	30%	24%	21%	38%	27%	28%
Few trainers with appropriate competencies	24%	22%	26%	20%	24%	24%	26%
Problems with premises, equipment, and furnishing	16%	17%	17%	19%	16%	16%	13%

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Chart 40

Identification of problems that the representatives of training firms and institutions believe to be important but were not mentioned in the questionnaire (N= 844)



Source: *BKL Study – Study of Training Firms and Institutions* 2010.

Table 15

Identification of problems that the representatives of training firms and institutions believe to be important but were not mentioned in the questionnaire (N= 844)

	Language school	CKU, CKP	ODZ	Institution of higher education	Driving school	Training firm	Training and consulting firm
Questions related to training quality	5%	20%	21%	13%	15%	24%	26%
Controversies related to awarding EU funds	23%	10%	18%	13%	15%	18%	13%
Suggestions to cut down red tape and simplify the procedures	7%	12%	12%	7%	13%	11%	8%
Problems related to unequal treatment of training firms	5%	11%	11%	13%	14%	10%	10%
Fine-tuning the legal regulations concerning opening and operation of training centres	0%	14%	12%	0%	20%	10%	8%
Greater openness of public institutions to the needs of the training market	7%	10%	11%	13%	3%	9%	16%
Increasing control over EU funds	0%	3%	4%	0%	2%	8%	5%
Clear definition of the VAT rate	34%	3%	2%	0%	4%	1%	3%
Suggestions related to changes in the system of education	2%	1%	2%	0%	0%	1%	0%
Actions aimed at lowering cost of training	5%	7%	6%	7%	7%	0%	4%
N	44	94	82	15	147	192	204

Source: *BKL Study – Study of Training Firms and Institutions* 2010.

5. Employer investment in human resources – review of study results

An important element in the improvement of the quality of human capital, complementary to the operation of training institutions and the educational activity of individuals (including the unemployed) are the investments in human resources made by the employers. During the Study of Human Capital in Poland project, the following questions related to the investment into human resources were examined:

- conducting a variety of activities aimed at the improvement of employer qualifications and competencies conducted during the preceding 12 months
- availability (penetration) of training among the personnel
- costs incurred for occupational training of the human resources in the preceding 12 months
- presence of a training fund in the enterprise
- reasons for embarking on no actions aimed at vocational training of the staff
- plans related to the occupational training of the staff in the coming 12 months.

Discussed below are the selected most important results in the area together with the questions that cause problems.

5.1. Problems related to investments in vocational training of the staff

Besides the well-recognised problems that recur in various studies, including among others, the lack of the need to train the staff resulting from the assessment of their qualifications as "satisfactory",[29] and greater educational and training activity in large enterprises,[30] problems of strategic nature seem especially worth attention in Poland.

Both the problems can be counted among the internal factors related to the employers. The first of them is the lack of well-conceived and planned strategy of human resources development, which could define the activity of the employers in the area in a longer span of time, as diagnosed among others in the PARP studies.[31] The actions undertaken, especially in the case of smaller businesses, provide in most cases an answer to the current needs of the firm, and relatively rarely result from a harmoniously designed plan of development of the enterprise and its staff. A significant dimension of the problem is its incapacitating impact on the possibility of diagnosing and formulating strategic recommendations concerning the development of human capital at the level of the country. The lack of interconnections between training activities and the goals of the enterprise sentences both researchers and commentators of the question to wander around the "false trails", rendering the diagnosing of the true problems more difficult.

The other, equally substantial problem is to a certain extent a consequence of the first, and is connected to the low level of innovation in business. The lack of new products and services in the range of services, and failure to use the new technologies limit the developmental needs of the staff. In consequence, this may lead to a stagnation in the development of human capital and the increasing disproportions between the developing businesses and their staff on the one hand, and the enterprises whose development is slowed down.[32] Taking into account the fact that the external factors that influence corporate investments in the development of human resources are relatively well recognised and described, and the data gathered in the Study of Human Capital in Poland make an in-depth analysis in specific subgroups possible, it is worth the effort to look at the results quoted through the perspective of the two problems mentioned above.

29 The Continuing Vocational Training Survey (CVT) conducted by Eurostat in 2005. This was the most frequently mentioned reason of the failure to undertake training in all the 27 EU countries.

30 J. Górniak, P. Mazur (ed.), *Pracodawcy a podnoszenie kompetencji zawodowych pracowników. Szkolenie i inne formy podnoszenia jakości zasobów ludzkich w przedsiębiorstwach*, CEAPP/MSAP, Kraków-Warszawa 2010.

31 *Doskonalenie kadr polskich przedsiębiorstw. Doświadczenia związane z realizacją Działania 2.3 Sektorowego Programu Operacyjnego Rozwój Zasobów Ludzkich*, Warszawa 2009, pp. 17–18.

32 J. Górniak, P. Mazur (ed.), *Pracodawcy a podnoszenie... op. cit.*, p. 49.

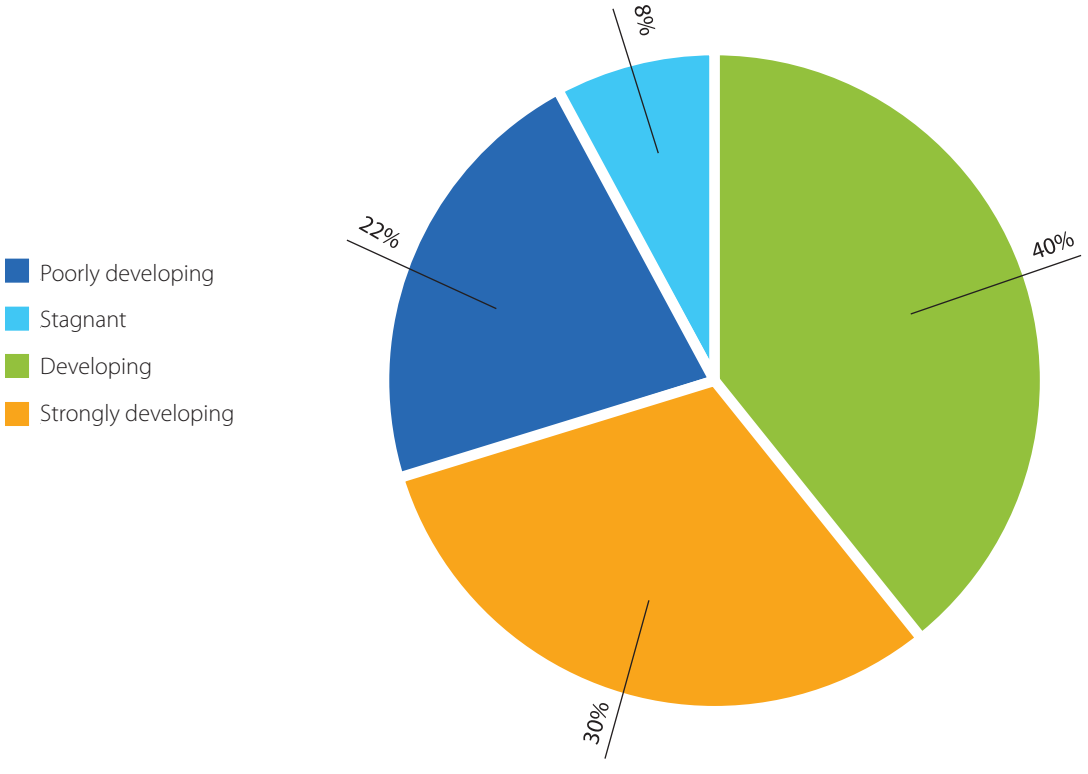
5.2. The context of educational and training activity of the employers surveyed

To become more aware of the role of the factors that are referred above as "internal", businesses that accounted for over 40% of the enterprises surveyed were distinguished from the group of the employers covered by the study.[33]

Taking into account the influence of the situation of the company (production of new products or services, increasing employment, improvement of the financial standing) on conducting actions related to the vocational training of the staff, it must be noted that nearly 40% of the enterprises surveyed introduced new or improved products, services, and methods of production in the last 12 months. The same proportion increased employment in the same period. In the case of more than every fourth enterprise, the respondents believed that the profit of the firm increased during the last 12 months. The combination of this information was used to divide the enterprises into the strongly developing, developing, poorly developing, and stagnant (Chart 41).[34] The dominant group (40%), where the poorly developing enterprises.

Chart 41

Assessment of the enterprise development in the last 12 months, in reference to the introduction of innovation, employment balance, and evaluation of the financial condition (N= 5319)



Source: *BKL Study – Employer Survey* 2010.

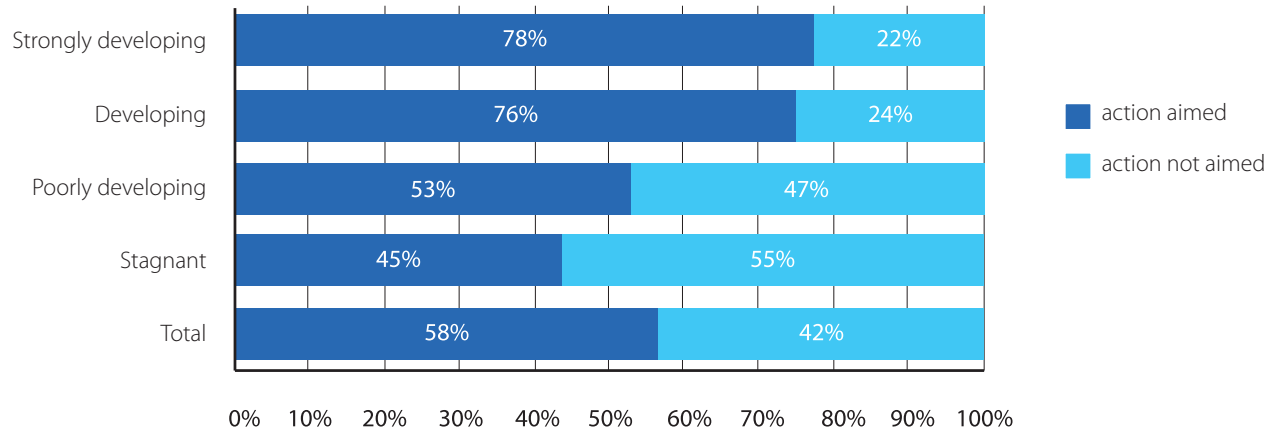
33 Identification of the enterprises concerns observations coming from the GUS sampling frame and operating in one of the following forms: partnerships, joint-stock companies, limited liability companies, general partnership, civil law partnership, limited partnerships, private unlimited partnership with share capital, state enterprises, cooperatives, and branches of foreign businesses.

34 Classified into the group of strongly developing enterprises were the ones that met all the following conditions: 1) during the preceding 12 months introduced new or improved products, services, and methods of production, 2) had positive employment balance in the preceding 12 months, and 3) in the assessment of own financial standing performed by the representative informed about in increase of revenue. Stagnant enterprises met none of the conditions defined above. The mixed forms were classified into the remaining two categories: the "developing" businesses if they met two of the three conditions, and the "poorly developing" businesses if they met only one of the conditions.

Worth paying attention to is the visible link between the assessment of the development of enterprise and the declaration to embark on actions aimed at improving the employee qualifications and competencies during the preceding year (Chart 42). The stronger the growth, the more often such activities are conducted (a gap of 33 percentage points between the stagnant and strongly developing businesses). In total, any investments in human resources were made during the last 12 months by 58% of the surveyed enterprises. Such investments were embarked on relatively more often parallel with the growth of the size of the enterprise. In the later parts of this chapter of the report, we will repeatedly return to this relationship.

Chart 42

Percentage of businesses investing in the development of human resources in the last 12 months (N= 5319)



Source: *BKL Study – Employer Survey* 2010.

5.3. Employers investing in the development of human capital[35]

Altogether, 55% of businesses surveyed conducted any actions in vocational training of their employees during the last 12 months. The employer respondents were asked about conducting a number of various forms of investment in human resources during the preceding year, including delegation to vocational, secondary or higher school, participation of employees in courses and training, competency assessment of the employees, and development of individual development plans of the personnel. The variety in the number of the instruments of professional development used and the expenditure on occupational training of the staff made it possible to distinguish groups of businesses achieving various levels of investment in their human capital. As far as the number of vocational training instruments applied is concerned, the most active were the businesses operating in the education sector (average: 2.8), and further – businesses active in administration and supporting services (average: 2.4.), and human health and social work activities (2.1.). Low activity was recorded among the businesses that represented electricity production and supply (1.2), and mining and quarrying (1.5) sectors. The smallest number of various instruments were used by businesses employing from 1 to 9 people (average: 1.7), and the widest spectrum of such instruments – by the largest businesses, employing 1000 and more people (average: 3.1.).

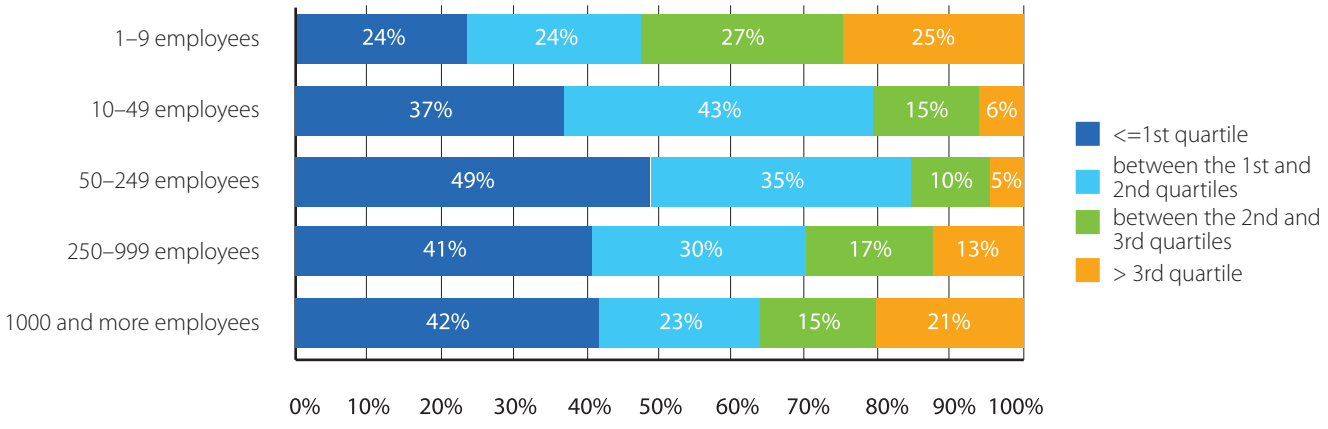
Interesting results were obtained in the analysis of expenditure on additional training of employees. Answers to the question about expenditure were provided by 7312 employers (41%), and 14% of the respondents were not capable of answering the question. Those who answered the question were divided into four groups defined by the quartile values of the cost of training per employee. This proved that relatively highest expenditure related to additional training of the staff was incurred by the employers who employed from 1 to 9 people, a quarter of them found themselves among the 25% of all the employers who spent most money on training per employee during the last 12 months (Chart 43).

35 Unless marked otherwise, the results presented in this subchapter concern only these employers who organised occupational training for their staff in the last 12 months.

Employers investing in the development of human capital

Chart 43

Employer expenditure on occupational training of the staff in the last 12 months
(N =7283)



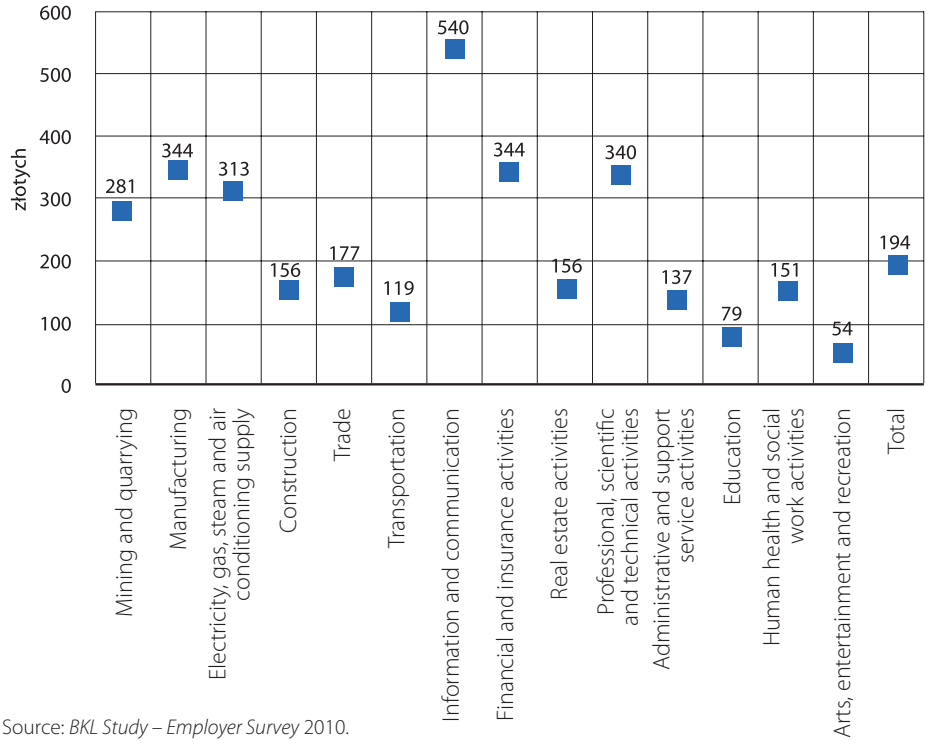
Quartile approach.

Source: *BKL Study – Employer Survey* 2010.

When broken down by sector (Chart 44), the highest costs of vocational training of employees were experienced by the employers in information and communication (average: PLN 540), followed by finance and insurance, and manufacturing (PLN 344), professional, scientific and technical activities (PLN 340), and electricity production and supply (PLN 313). The lowest costs were present among the employers in the following sectors: arts, entertainment and recreation (PLN 54), education (PLN 79), and transportation (PLN 119). The overall average was PLN 194.

Chart 44

Expenditure in PLN incurred for the occupational training of employees in the last 12 months recalculated per employee; results for employers representing selected sectors
(N =7311)



Source: *BKL Study – Employer Survey* 2010.

It is worth noting that activity concerning the wide selection of instruments of vocational training does not always find reflection in expenditure incurred for that purpose. Education, healthcare, and welfare provide good examples. The key to the understanding of this dependency is the analysis of the forms of vocational training, and its subject range.

From the territorial perspective, the highest average value was achieved by the employers from the Zachodniopomorskie (PLN 770, median: PLN 500), Opolskie (PLN 289) and Dolnośląskie (PLN 232) regions, and the lowest – by the employers from the Lubuskie (PLN 82), Warmińsko-Mazurskie (PLN 93) and Podkarpackie (PLN 95) regions.

As far as the training availability (penetration) index[36] in the businesses surveyed is concerned, its average value differs in individual administrative regions. The Table 16 shows the average values of the index for businesses of various size in the 16 administrative regions. In most cases, this index lies in the range from 21% to 30%. The lowest value is recorded in the case of the largest employers with 1000 and more employees, in large businesses in the Pomorskie administrative region, and in the medium-sized businesses in the Lubuskie region. The highest values of the index were achieved by the employers, employing from 1 to 9 people (average 31%). In the breakdown by the administrative region, the index reached its lowest value in the Podkarpackie (15), and the highest – in Wielkopolskie (49%). Worth paying attention are the businesses that achieved an extraordinarily high value of the index, namely the large businesses from Małopolskie region and employers employing from 1 to 9 people in the Wielkopolskie region (average 53%).

Table 16

Average value of the training availability index in businesses of various size in 16 administrative regions (N=9751)[37]

	1-9 employees	10-49 employees	50-249 employees	250-999 employees	1000 and more employees	Total
Dolnośląskie	27%	27%	19%	23%	9%	25%
Kujawsko-pomorskie	22%	29%	24%	18%	19%	23%
Lubelskie	37%	39%	28%	15%	18%	35%
Lubuskie	27%	32%	8%	29%	0%	24%
Łódzkie	32%	36%	26%	16%	14%	30%
Małopolskie	30%	24%	21%	53%	30%	29%
Mazowieckie	23%	29%	22%	16%	10%	23%
Opolskie	25%	32%	26%	16%	5%	26%
Podkarpackie	13%	33%	21%	24%	6%	15%
Podlaskie	24%	30%	27%	17%	16%	25%
Pomorskie	19%	31%	14%	8%	10%	18%
Śląskie	32%	28%	25%	17%	16%	31%
Świętokrzyskie	25%	35%	20%	22%	15%	25%
Warmińsko-Mazurskie	20%	32%	23%	18%	6%	21%
Wielkopolskie	53%	29%	22%	22%	12%	49%
Zachodniopomorskie	34%	18%	20%	18%	37%	31%
Total	31%	29%	21%	20%	14%	29%

Source: *BKL Study – Employer Survey* 2010.

36 The training availability index is the ratio of employees participating in training in the last 12 months to the total number of the employees of the given business or institution.

37 The result concerns only independent units, which account for 88% of the sample.

Employers investing in the development of human capital

The value of the index amounted to 29%, which means that it is by 10 percentage point higher than in 2005 in the GUS study.[38]

The sector with the lowest value of the training availability index in the enterprises surveyed was mining and quarrying (12%), with the further sectors being trade and transportation (17%) and services related to the accommodation and food service activities sector (18%). The decidedly highest result was achieved by administrative and support service activities (63%) with education (39%), other services (38%), financial and insurance services (36%), and human health and social work activities (35%) ranking below.

Of the number of enterprises surveyed, 10% have a training fund at enterprise level. As expected, this fact was most frequently reported by employers representing the largest businesses (65%). Moreover, it is worth noting that representatives of medium-sized enterprises (from 50 to 249 employees) declared having such a fund somewhat more often that representatives of employers who employed from 250 to 999 employees (45% and 37%, respectively). In the group of enterprises surveyed no clear-cut relationship between the assessment of the development of the enterprise and the establishment of enterprise training fund was observed.

Such a fund is characteristic primarily of such sectors as education (61% of businesses in this sector indicated the presence of an enterprise training fund), electricity production and supply (40%), and arts, entertainment and recreation (37%). The fund is least often present among the employers who belong to the following sectors: mining and quarrying (90% of representatives of the sector declared no such fund), trade (95%), and manufacturing (94%). The enterprises with an enterprise training fund are (on average) involved in a larger number of vocational training forms than businesses that have no such fund.

5.4. Forms of investment in human resources and other vocational training activities

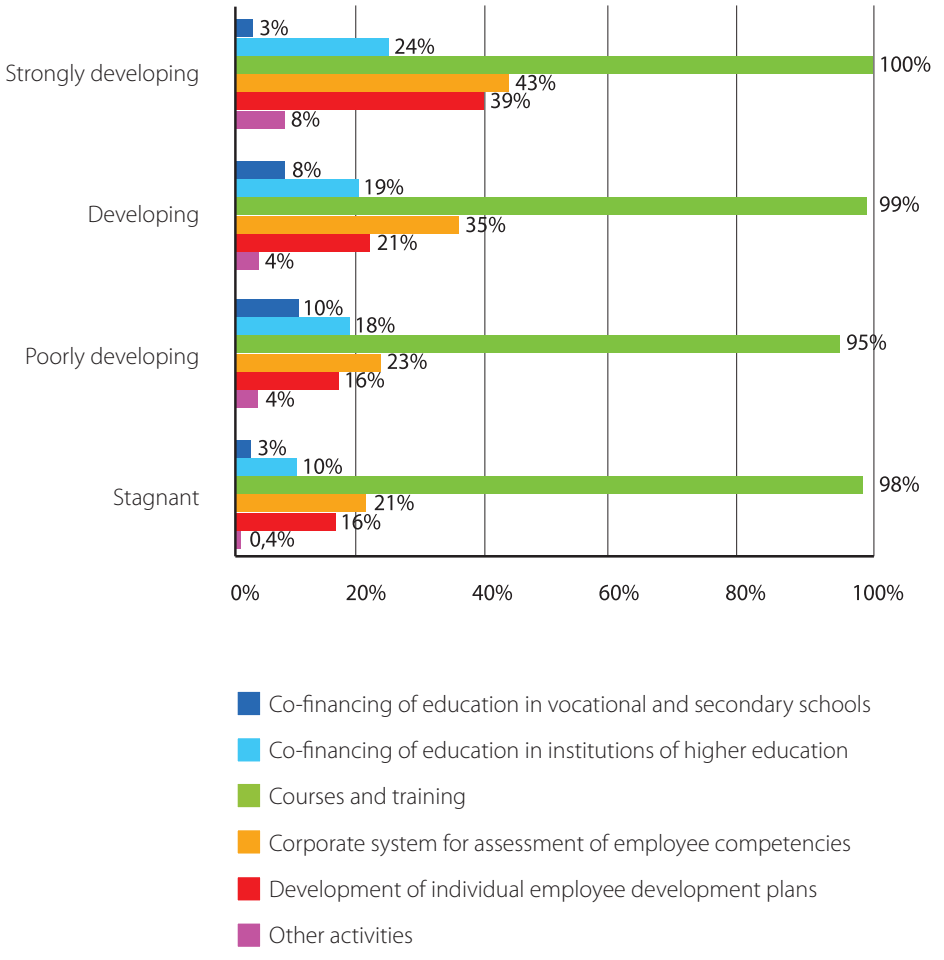
Many of the employers who undertook any activity to further the development of human capital in the last 12 months, used or organised courses and training (95%). A third of the employers declared that they employ a system for evaluation of employee competence. More than one in five developed or used individual plans of employee development. Co-financing of education in institutions of higher education (including post-graduate studies) was reported by 18%, while 6% co-financed their education in secondary and vocational schools. Other forms of activity were mentioned by 5% of the employers surveyed.

All types of activities mentioned above, apart from courses and training, were clearly used the more often the larger the number of the employed was. There is no surprise in the fact that the largest difference between the smallest and largest businesses was present in the case of co-financing education of the staff in institutions of higher education (16%, compared to 71%), i.e. in the case of the form of education that generates costs higher than the others. Moreover, it must be remembered that in the case of an employer who employs a larger number of staff, the need to co-finance education at higher level is present more frequently. An exception here are the businesses employing from 250 to 999 people: this category of employers had the highest level of courses and training conducted (99%), yet in the case of the remaining instruments of education, it ranked below medium-size businesses. In the case of enterprises, differences between the more strongly and poorly developing companies were visible, especially as far as the more complex, "holistic" instruments were concerned (Chart 45).

38 The study, entitled *Ustawiczne szkolenie zawodowe w przedsiębiorstwach*, GUS 2007.

Chart 45

Actions aimed at improving employee qualifications and competencies by the type of enterprise (N=3901)



Source: *BKL Study – Employer Survey* 2010.

The more strongly developing enterprises apply individual plans of development of their staff and systems for assessment of competence more frequently. Moreover, they are more likely to co-finance education in institutions of higher education and use other forms of investment in the development of the staff, e.g. purchase of specialist literature and co-financing of education in foreign languages (17% of responses each), and coaching (14%). In the case of these businesses, one can speak of the signs of conscious, long-term planning in the development of competencies whose deficit was defined as a significant problem in human capital development in the enterprises.

The industries differ one from another in the use of various vocational training instruments. The Chart 46 shows these differences for three groups of sectors and four individual sectors that needed separate treatment. The percentage analysis of the similarities and differences between the sectors as far as the educational instruments are used allowed the distinguishing the following groups:

Group 1: water supply; sewerage, waste management and remediation activities, financial and insurance activities, real estate activities, professional, scientific and technical activities,

Group 2: mining and quarrying, electricity production and supply, other service activities,

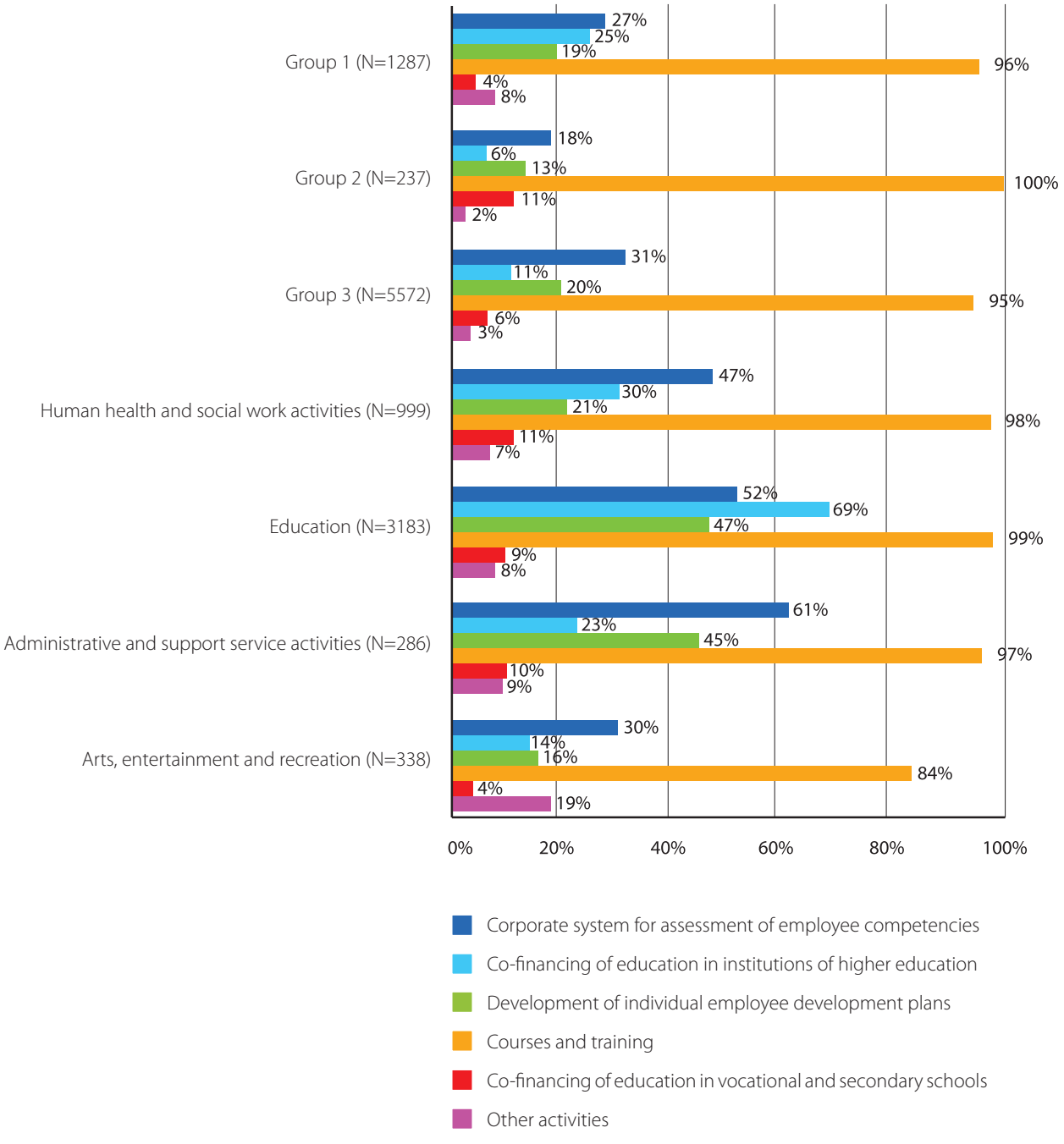
Group 3: manufacturing, construction, trade, transportation, accommodation and food service activities, information and communication.[39]

39 Attention must be paid also to the fact that such grouping of the sectors finds its grounds only in the declarations of using various types of vocational training instruments in the last 12 months, and does not reflect differences between the sectors included into the same group, as far as e.g. the availability of training described above, and the spending on employee education incurred are concerned.

Forms of investment in human resources and other vocational training activities

Chart 46

Application of vocational training instruments in sectors and sector groups



Source: *BKL Study – Employer Survey* 2010.

The smallest differences between the groups of sectors and individual sectors mentioned above are observed in the case of using courses and training: they were mentioned most frequently among of the ways of investment in human capital (from 84% to 100%). Among the employers who in the last 12 months used courses and training, no fewer than 84% selected external courses and training (these were usually the businesses from the human health and social work activities sector – 96%), a practice that was least frequent among businesses in the Group 2 (74%). Moreover, not even every other (49%) employer organised internal courses and training, a practice that was most frequent in the educational sector (64%), and least – among the businesses operating in human health and social work activities (42%).

As can be seen from the chart, education stands out clearly against the other sectors: businesses operating in this sector use various vocational training instruments, and moreover, they do it often. Worth paying attention is also the sector related to administrative and support service activities that dominates (61%) in the application of systems for assessment of employee competencies, with numerous declarations of applying the instruments present also in education and healthcare. In both the sectors developing individual development plans of the employees was most frequently mentioned (45% and 47%, respectively). The sector of arts, entertainment and recreation is conspicuous for two reasons: businesses operating within it use courses and training relatively least frequently (84%), and at the same time, they most frequently use the "other" ways of investments in human capital (19%) that are discussed below.

Individual conspicuous sectors aside, it is worth paying attention to the differences between the groups of sectors created above. In the first group, which can be approximated as specialist services, co-financing of education in institutions of higher education was declared far more often than in the other groups (every fourth businesses included in the group). Moreover, also the use of a system for assessment of competencies (over a quarter) was also relatively often declared, and so was the development of individual development plans (every fifth business). In the second group, featuring businesses from the mining and quarrying, and energy sectors, the individual instruments were applied rather infrequently, with the exception of courses and training (100%), and co-financing of education in secondary schools for the employees (11%, being the highest result). The third group, being most numerous, may, in a sense, be considered the most "typical", to the largest degree similar to the general distribution of forms of investing into human resources in the entire population studied. Thus, the decided majority of employers make use of courses and training, approximately every one in three uses a system of competency assessment, around a fifth establish individual plans of employee development, few co-finance employee education in institutions of higher education, and even fewer pay for education in secondary schools.

It is worth mentioning that postgraduate studies (as a form of education) were mentioned not only in the context of co-financing education by the employer. They also mentioned as the employees start studying on their own („at the expense from their own pocket"), and also in the context of using EU funds (e.g. from the Human Capital Operational Programme) for that purpose. The number of "other" activities conducted by the employers to improve their qualifications and competencies of their staff included usually conferences, lectures, workshops and seminars (23% of mentions), self-education of the personnel (17%), purchase of specialist literature and development of teaching materials (12%), and co-financing of education of foreign languages (11%), participation in fairs, shows, and presentations (9%), and introduction of changes in management (e.g. accreditation, systems of cooperation – 7%).

Besides the activities focused on the employees. It must be mentioned that only in the case of 34 respondents, there was a mention of organisation of vocational internships and traineeships.[40]

5.5. Subject range of training

As the subject range of training portrays the greatest variation between the employers surveyed, the results will be presented in the most interesting, selected aspects that allow complementation of the picture emerging from the conclusions presented above. The collective result for all the employers surveyed does not diverge too far from what is presented in the studies devoted to corporate investment in human capital: training in legal questions, safety at work, and fire protection (from 14% to 16%) found its way to the top 4 types of training listed by the employers conducting any actions to provide additional education for their employees. First in this overall list comes technical training related to construction and industry (one fourth of mentions), followed by training in trade and customer care (18%).[41]

Comparison of the subject range of the training provided in six selected sectors (I–VI) was made: the three that spent most (according to the average value) on training during the last 12 months, and the three that spent least (as recalculated per employee).[42] In the case of each sector, the 10 most frequently mentioned training subjects were listed.

40 The reason for such a status quo must have been the lack of a separate question about internships and traineeships. The employers listed these activities among "other" actions focused on the occupational development of the current employees.

41 Therefore, despite the differences, these results are similar to the studies quoted in the already cited report edited by J. Górniak and S. Mazur, Pracodawcy a podnoszenie..., op. cit., p. 35.

42 Due to the specific traits of the subjects of training in the sector "education" and also because the characteristic features of businesses operating in this sector are notably different than in the others, a decision was made to remove it from this comparison.

Table 17

The 10 most frequently listed subjects of training among employees in selected sectors

Sectors in which most funds are earmarked to training		
I. Information and communication (N=149)	**II. Financial and insurance activities** (N=188)	**III. Manufacturing** (N=2254)
Subjects of training		
Information technology – programming (16%)	Insurance – insurance agent (18%)	Safety at work regulations (26%)
Information technology – using specialist software related to the job (13%)	Other – misc. related to law (12%)	Stationary plant and machine operator (18%)
Information technology – computer literacy, e.g. MS Office (11%)	Vocational, no category specified (12%)	Misc., specialist in construction and industry (9%)
Basic accounting (11%)	Sales techniques, professional client care (11%)	Vocational, no category specified (8%)
Misc. specialist in construction and industry (8%)	Basic accounting (10%)	Sales techniques, professional client care (8%)
Tax law (8%)	Other, related to financial services (9%)	Tax law (7%)
Sales techniques, professional client care (7%)	Misc., specialist in construction and industry (8%)	First aid (7%)
Architecture, designing sites and buildings (7%)	Tax law (8%)	Forklift truck operator (6%)
Accounting (7%)	Other, related to enterprise management (6%)	Other, related to trade, sales, and customer care (5%)
English language (7%)	English language (6%)	Fire prevention (5%)
Sectors with least funds earmarked to training		
IV. Arts, entertainment and recreation (N=328)	**V. Transportation and storage** (N=391)	**VI. Human health and social work activities** (N=966)
Subjects of training		
Public aid and principles of awarding it (19%)	Other, for drivers, mechanics, related to transportation, cars and vehicles (29%)	Specialist medical courses for physicians (18%)
Information technology – computer literacy, e.g. MS Office (18%)	Safety at work regulations (20%)	Safety at work regulations (18%)
Other, related to accommodation and food service activities, tourism, recreation (14%)	Sales techniques, professional client care (10%)	Courses for nurses, male nurses, and medical technicians (13%)
Corporate finance management, budgeting (13%)	Time management (8%)	Specialist courses for dentists (11%)
Protection of personal data (13%)	Tax law (8%)	First aid (11%)
Sales techniques, professional client care (13%)	Logistics and supply management (8%)	Education, training, teacher training (10%)
Basic accounting (11%)	Other, related to enterprise management (7%)	Other, related to personal development (10%)
Other, related to public administration (10%)	Other, related to law (5%)	Social work activities (7%)
Other, related to enterprise management (8%)	Freight licences (5%)	Sales techniques, professional client care (6%)
English language (7%)	English language (5%)	Other, related to the services provided (5%)

Source: *BKL Study – Employer Survey* 2010.

As can be noticed, still a large proportion of training comprises training that is compulsory (e.g. safety at work in the "technical" sectors and healthcare) and/or related to the current operation of the firm or institution (law, bookkeeping and accounting). They emerge irrespective of differences in expenditure on training incurred by employees in various sectors. Some training is of typically "sectoral" character of vocational education or training, intrinsic to the path of development of the employee engaged in a specific occupation or holding a specific position. Relatively many subjects are related to enterprise management and its relationships with the environment, and especially with the clients.

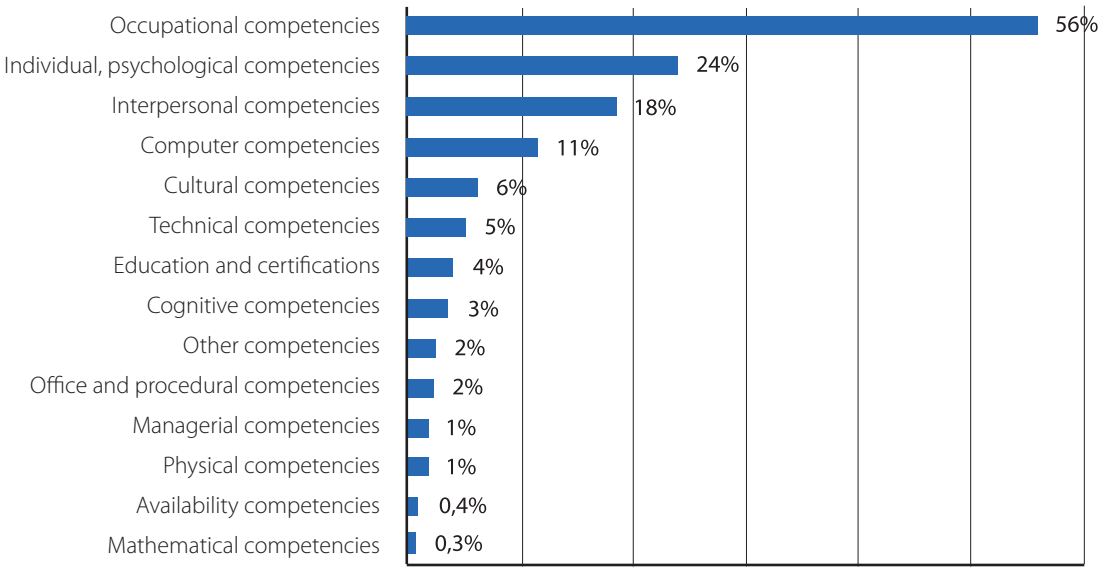
Investigating the financial justification of the businesses surveyed, it is worth noting that chosen as first are those forms and subjects of training that are essential from the point of view of the employer. It can be expected that only once a certain minimum has been met, they can allow more "sophisticated" trends of individual or team development.

5.6. Training needs

It goes without saying that the relationship between the range of existing training, and the training needs of employers is a significant question. In the Study of Human Capital in Poland, it was assumed that a credible indicator of these needs is the definition of competencies that the employers believe to be lacking among their employees. The statements of the respondents were classified into the 11 categories of competencies. The Chart 47 shows their distribution among all the employers who considered that the competencies of their employees require additional training and/or education (a claim made by 47% of employer respondents).

Chart 47

Competencies and qualifications that the employers believe to be lacking among their current employees (in %) (N=8873)



Source: *BKL Study – Employer Survey* 2010.

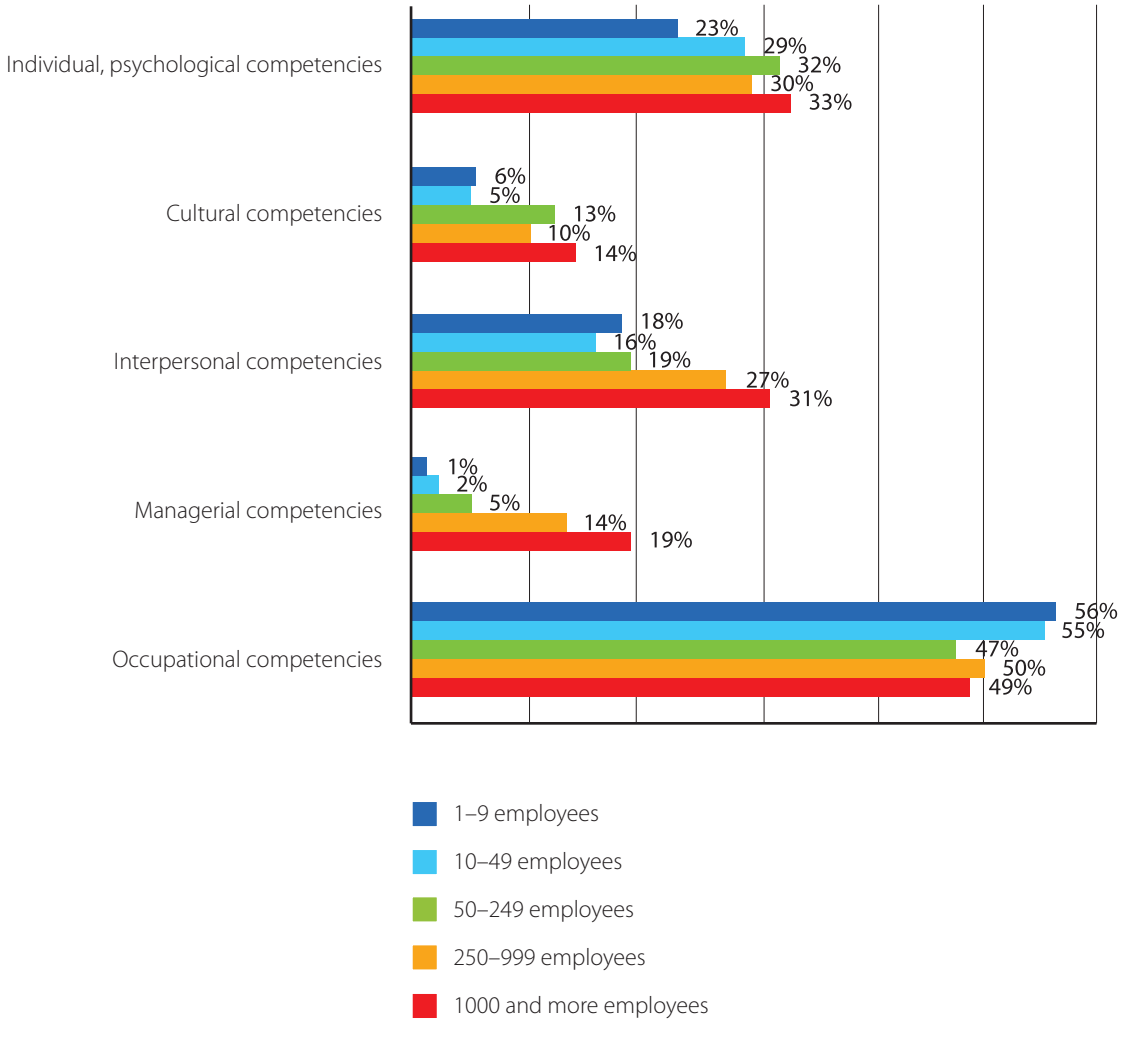
Training needs

As can be seen, employers categorically pointed to the shortages of competencies related to the performance of a specific occupation, and therefore they assess critically the professionalism of the employees. Listed further were individual competencies, i.e. primarily the effort to improve their qualifications (6% of all the answers), independence (5%), and responsibility and time management (4% each). Third most frequent came the statements concerning interpersonal competences related to the relationships between the employee and the employee's environment (colleagues, clients). It is worth emphasising that as far as occupational competencies may be relatively easily reinforced, developed and trained, the second and third most numerous categories are the "soft" competencies that cannot in any way be associated with knowledge and/or qualifications, for which reason they are more difficult to develop.

In the case of most (even though not all) sectors, the deficit of "soft" competencies – individual, interpersonal, managerial, and cultural – was pointed to by the representatives of larger businesses (Chart 48). This may mean that the problem that the employers pay attention to is the lack of familiarity with the so-called organisational culture: subscribing to the objectives and mission of the firm, group work, self-management and management of others, and the lack of readiness for upward mobility in the hierarchy of the firm. In turn, as a rule the employers with fewer staff (but not in all the sectors) more frequently pointed to the deficit of occupational, technical, and computer competencies.

Chart 48

Selected missing competencies of the employees by the number of people employed (in %) (N=8873)



Source: *BKL Study – Employer Survey* 2010.

Comparing the results stemming from the analysis of the subject range of training and the deficient skills, one has grounds to believe that there is a significant gap between the demand of the employers for specific competencies in the subject range of courses and training, in which their staff participate. It is worth examining what this looks like precisely in the six sectors discussed above (the three with the highest, and the three with the lowest training expenditure) as to a degree they diverge from the tendency visible above.

Table 18

Employee competency shortages according to employers from selected sectors (in %)

Competencies	No. of people employed	Information and communication (N=120)	Financial and insurance activities (N=134)	Manufacturing (N=1940)	Arts, entertainment and recreation (N=245)	Transportation and storage (N=334)	Human health and social work activities (N=691)
Individual, psychological	1-9	24%	14%	23%	16%	26%	31%
	10-49	21%	21%	32%	20%	30%	27%
	50-249	18%	25%	30%	37%	28%	34%
	250-999	38%	34%	29%	16%*	30%	37%
	1000 +	N/A	32%*	32%	0%	40%*	38%
	Total	24%	15%	24%	17%	26%	31%
Cultural	1-9	N/A	2%	4%	5%	17%	0%
	10-49	2%	0%	4%	8%	10%	2%
	50-249	14%	14%	12%	16%	13%	1%
	250-999	8%*	13%*	13%	16%*	17%	4%
	1000 +	N/A	0%	15%	0%	0%	0%
	Total	0,1%	2%	4%	5%	17%	0,1%
Interpersonal	1-9	15%	40%	11%	17%	12%	21%
	10-49	26%	40%	11%	17%	7%	19%
	50-249	33%	28%	18%	18%	20%	22%
	250-999	69%	40%	27%	32%*	24%	19%
	1000 +	N/A	0%	24%	100%*	22%*	29%
	Total	15%	40%	11%	17%	12%	21%
Managerial	1-9	3%	2%	2%	0%	2%	0%
	10-49	2%	2%*	3%	0%	4%	1%
	50-249	34%	13%	7%	3%	6%	1%
	250-999	15%*	27%	19%	0%	13%	1%*
	1000 +	N/A	0%	26%	0%	0%	5%*
	Total	3%	2%	2%	0,1%	3%	0%
Occupational	1-9	36%	49%	57%	61%	48%	62%
	10-49	55%	68%	47%	59%	50%	63%
	50-249	37%	57%	44%	39%	48%	54%
	250-999	45%	51%	50%	38%*	64%	55%
	1000 +	N/A	68%*	60%	100%*	53%	46%
	Total	36%	49%	66%	60%	48%	62%
Computer	1-9	46%	8%	6%	17%	5%	13%
	10-49	21%	6%	6%	22%	5%	6%
	50-249	30%	10%	9%	14%	11%	9%
	250-999	24%*	12%*	8%	32%*	10%	12%
	1000 +	N/A	0%	14%	100%*	0%	18%*
	Total	45%	8%	7%	18%	5%	13%

* Cell value <10 (% values within the enterprise size category); N/A – not applicable.

Source: *BKL Study – Employer Survey* 2010.

Lack of training activity among the employers and reasons thereof

As far as the employers in the information and communication sector are concerned, they are an example of conscious investment in training, in line with the diagnosed needs: on the one hand they perceive the shortages of human resources in the scope of computer competencies, and on the other – as it was presented in the part devoted to the subject range of training, they most frequently resort to a variety of IT training. Elsewhere, for example, in the financial and insurance section, a strong emphasis on the development of occupational competencies (diagnosed as deficit) may be seen with the parallel weaker stress on the development of – also lacking – "soft" competencies. (Of the "top 10" most popular subjects of training in businesses from the sector, only training in sales techniques and professional client care can be associated with this group of competencies.). In turn, the sector of human health and social work activities, where the employers pointed to the serious shortages in individual competencies, training and personal development is embarked on, even though in the face of the development of occupational competencies it moves to a more distant plane.

Moreover, worth paying attention to are a number of selected, characteristic results:

- among the businesses from the six selected sectors, the greatest demand among the "soft" competencies pertains to individual psychological competencies (especially among the employers with larger number of employees)
- in the sector related to finance and insurance, being an example of basing everyday operation on powerful relationships with the client, the increased need for interpersonal competencies is visible
- the need for "cultural" competencies concerns in fact only medium-sized and large enterprises
- in the sectors in which the hierarchical, organised organisational structures are frequently present (e.g. information and communication, manufacturing) the demand for managerial competencies is higher
- the demand for occupational competencies is equally strong, irrespective of the sector and size of the businesses investigated.

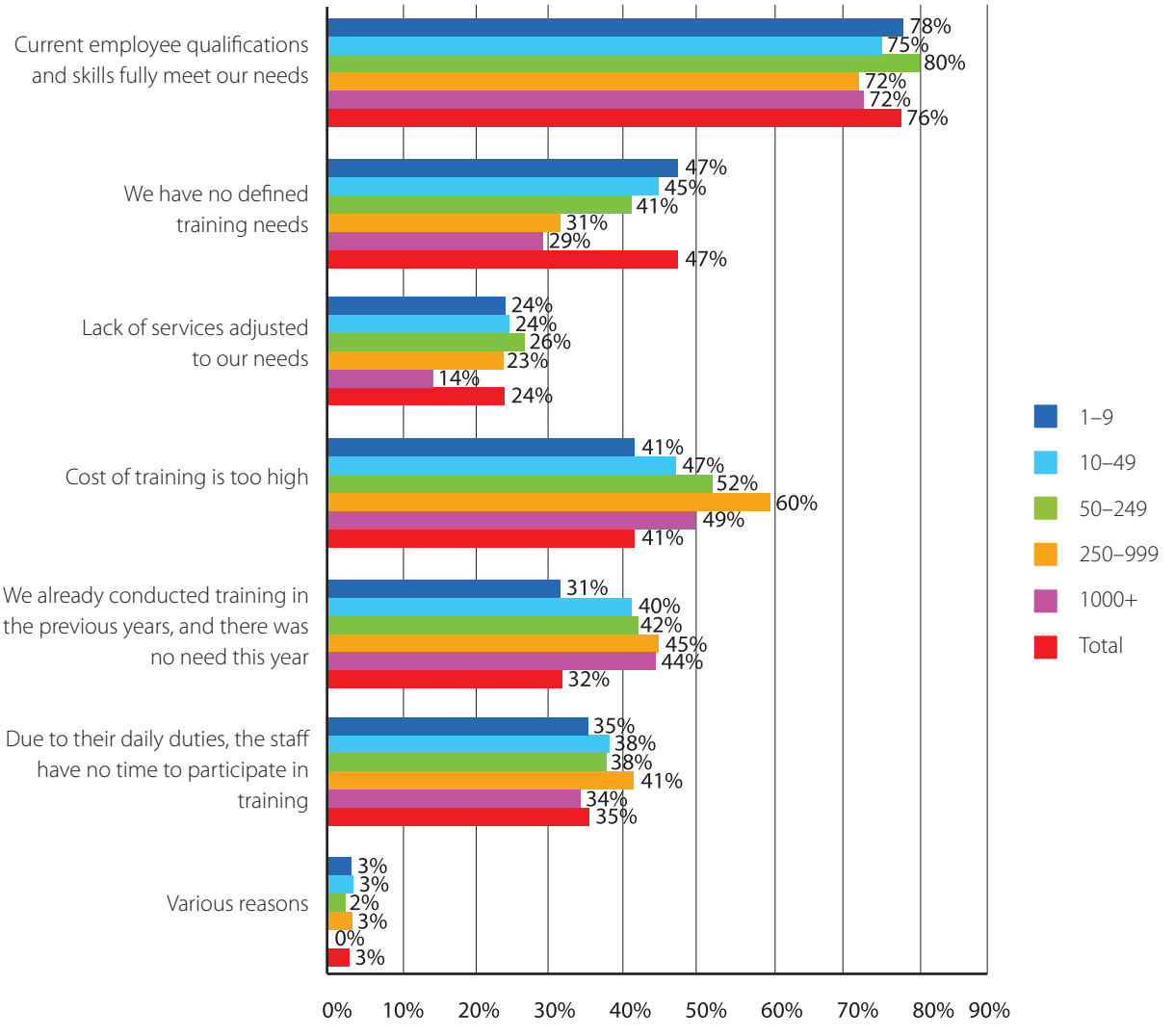
Summing up this part of analysis, one may venture to say that the conclusion about the mismatch between the training needs of the businesses analysed (defined against the competencies lacking among the employees) and the current subject range of training is partially corroborated. Yet it seems that the employers (or at least some of them) are aware of that and try to take actions to decrease the developing competency gap.

5.7. Lack of training activity among the employers and reasons thereof

Attention must also be devoted to the larger group of employers (45% of all the respondents), who in the last 12 months did not embark on any actions aimed at vocational training of their human resources. The reason for lack of activity in the area pointed to most frequently was the assessment of the current qualifications and skills of the employees as sufficient (more than 75% of answers).

Chart 49

Reasons for engaging in no training actions in the last 12 months (in %) (N=3913)



Source: *BKL Study – Employer Survey* 2010.

The volume of employment did not have a major bearing on that answer, albeit it influenced the answers related to: 1) "lack of defined training needs," and 2) the cost of training. In the first case, the answer turned up more often in the case of employers employing fewer people, and in the latter – the declaration was made more often with the growth of the employment. Among the employers employing at least 10 people, the cases in which training in the current year was considered unnecessary due to the earlier actions of the type were more frequent.

When it comes to the lack of defined training needs among the employers employing fewer than 250 people, it can be assumed that in many cases this results (especially in the case of the smallest entities) from running an activity that does not require continuous education. Moreover, it must be mentioned that more than one in five employers stated that the lack of their training activity results from the lack of appropriate services offered. The Table 19 contains answers from representatives of five sectors, in which more than 50% of employers did not engage in any training activities during the last 12 months.

Lack of training activity among the employers and reasons thereof

Table 19

Reasons for the failure to engage in training activities in the last 12 months in the sectors with lowest training activity (in %)

Competencies	No. of people employed	Transportation and storage (N=228)	Manufacturing (N=1100)	Water supply; sewerage, waste management and remediation activities (N=56)	Accommodation and food service activities (N=123)	Wholesale and retail trade (N=1060)
Current employee qualifications and skills fully meet our needs	1-9	86%	77%	85%	72%	78%
	10-49	72%	78%	77%	76%	74%
	50-249	72%	80%	83%	78%*	82%
	250-999	70%	72%	N/A	N/A	63%
	1000 +	0%	55%*	N/A	100%*	67%
	Total	86%	77%	84%	75%	78%
We have no defined training needs	1-9	49%	48%	48%	32%	50%
	10-49	41%	50%	24%	50%	44%
	50-249	41%	50%	63%	44%*	33%
	250-999	41%	33%	N/A	N/A	36%
	1000 +	0%	55%*	N/A	0%	33%*
	Total	49%	48%	47%	42%	50%
Lack of services adjusted to our needs	1-9	20%	30%	23%	17%*	25%
	10-49	15%	25%	24%	32%	25%
	50-249	14%	19%	9%*	33%*	44%
	250-999	20%*	23%	N/A	N/A	34%
	1000 +	0%	0%	N/A	0%	0%
	Total	20%	29%	23%	26%	25%
Cost of training is too high	1-9	28%	42%	16%	53%	39%
	10-49	43%	44%	47%	52%	49%
	50-249	73%	57%	60%	56%*	40%
	250-999	58%	60%	N/A	N/A	74%
	1000 +	100%*	45%*	N/A	0%	33%*
	Total	28%	42%	18%	52%	39%
We already conducted training in the previous years, and there was no need this year	1-9	35%	33%	72%	30%	31%
	10-49	35%	37%	25%	50%	40%
	50-249	29%	38%	46%	33%*	36%
	250-999	31%	41%	N/A	N/A	47%
	1000 +	0%	55%*	N/A	0%	33%*
	Total	35%	33%	69%	41%	31%
Due to their daily duties, the staff have no time to participate in training	1-9	35%	38%	25%	26%	33%
	10-49	39%	36%	27%	39%	40%
	50-249	39%	43%	66%	67%*	32%
	250-999	64%	45%	N/A	N/A	49%
	1000 +	0%	100%*	N/A	0%	50%*
	Total	35%	38%	25%	36%	34%
Various reasons	1-9	2%	3%	0%	0%	2%
	10-49	2%	2%	15%	5%*	2%
	50-249	2%*	2%	0%	0%	3%
	250-999	0%	1%*	N/A	N/A	3%*
	1000 +	0%	0%	N/A	0%	0%
	Total	2%	3%	1%	2%*	2%

* Cell value <10 (% values within the enterprise size category); N/A – not applicable.

Source: *BKL Study – Employer Survey* 2010.

Lack of training activity among the employers and reasons thereof

As can be seen, the basic reason for the lack of training activity, that is the sufficient skills of the employees, is present equally frequently also irrespective of the sector. Complaining on the high cost of training were relatively most often the employers representing the manufacturing and accommodation and food service activities sectors, and also the employers with the largest number of employees. The employers from the water supply; sewerage, waste management and remediation activities sector clearly declared that they engaged in training actions in the previous years. Lack of time for participation in training was mentioned far more often by the employers representing larger businesses.

The answer "various" (i.e. misc.) was selected rarely (3% of the employers, n=108), nevertheless, let's list the ones that turned up most frequently:

- employee churn and liquidity of employment (23%),
- shortage of orders, economic crisis (19%),
- self-education of the employees (15%),
- lack of interest of the staff in education (15%),
- decision of the superiors (10%),
- large distance from training centres (8%),
- restructuring and organisational changes (6%),
- Poor quality of training (4%).

5.8. Training plans of employers for the coming 12 months

As far as the training plans for the near future are concerned, they are very strongly related to the actions that have been engaged in so far. More than two thirds of the employers (60%) who invested into human resources in the last 12 months planned to organise internal courses or use external training for their human resources in the coming 12 months. In the group of employers not active on the area of training, such plans are disclosed only by one in every five. In the case of training activities of other type, this difference is not as drastic (24%, compared to 8%) but still noticeable.

Plans related to employee training were most frequently reported (over 60% of positive answers) by the employers representing the following sectors: electricity, gas, steam and air conditioning supply (88%), water supply; sewerage, waste management and remediation activities (65%), information and communication (64%), financial and insurance activities (63%), education (73%), and human health and social work activities (66%). Other actions related to the occupational training and education of the staff are planned most frequently in the education sector (35% of positive statements) in human health and social work activities (26%), and in administration services (26%).

Training plans of employers for the coming 12 months

Table 20

Plans related to occupational training and education of employees in the coming 12 months among employers in various sectors (in %) (N=15837)

Sector		1-9	10-49	50-249	250-999	1000+	Total
Mining and quarrying (N=69)	Training	58%	40%	77%	93%	100%	58%
	Various activities	22%	11%	32%	36%	48%	22%
Manufacturing (N=3417)	Training	39%	46%	70%	86%	83%	41%
	Various activities	13%	14%	23%	36%	54%	14%
Electricity production and supply (N=107)	Training	90%	70%	88%	96%	85%	88%
	Various activities	0%	24%	27%	53%	47%	4%
Water supply; sewerage, waste management and remediation activities (N=338)	Training	65%	62%	76%	95%	100%	65%
	Various activities	16%	26%	26%	30%	100%	18%
Construction (N=1329)	Training	42%	60%	69%	77%	80%	43%
	Various activities	20%	13%	20%	40%	67%	19%
Wholesale and retail trade (N=2688)	Training	38%	53%	71%	79%	76%	39%
	Various activities	14%	14%	23%	30%	59%	14%
Transportation and storage (N=645)	Training	35%	51%	79%	78%	100%	36%
	Various activities	12%	12%	23%	32%	60%	12%
Accommodation and food service activities (N=330)	Training	43%	52%	63%	86%	59%	43%
	Various activities	16%	20%	21%	14%	41%	16%
Information and communication (N=217)	Training	65%	56%	85%	91%	63%	64%
	Various activities	21%	13%	44%	37%	38%	21%
Financial and insurance activities (N=228)	Training	63%	84%	88%	81%	75%	63%
	Various activities	19%	23%	54%	59%	63%	19%
Real estate activities (N=347)	Training	46%	72%	90%	2%	26%	47%
	Various activities	13%	9%	6%	1%	26%	12%
Professional, scientific and technical activities (N=678)	Training	57%	72%	76%	87%	100%	57%
	Various activities	17%	21%	37%	46%	31%	17%
Administrative and support service activities (N=394)	Training	48%	44%	62%	79%	80%	48%
	Various activities	26%	24%	26%	30%	53%	26%
Education (N=3413)	Training	64%	90%	86%	85%	83%	73%
	Various activities	28%	50%	46%	44%	45%	35%
Human health and social work activities (N=1108)	Training	66%	74%	86%	86%	85%	66%
	Various activities	26%	29%	36%	46%	61%	26%
Arts, entertainment and recreation (N=395)	Training	52%	75%	56%	77%	0%	55%
	Various activities	6%	30%	26%	43%	0%	9%
Other service activities (N=134)	Training	54%	71%	56%	61%	0%	55%
	Various activities	25%	20%	12%	39%	0%	25%

Source: *BKL Study – Employer Survey* 2010.

Visible in most sectors is the increase of answers confirming the intention to provide employee training running parallel to the volume of employment.

5.9. Summary

While discussing the results of the employer study, it is worth noting that the problem of innovation in enterprises and its relationship with investments in human resources mentioned earlier in this part of the report, proved its significance in many of the analyses presented above. The more innovative, thriving, and developing enterprises were more frequently involved in actions ensuring the staff with vocational training. They also influenced the results of the training as presented by section. Especially worth emphasising is the fact that these businesses more frequently applied varied instruments of vocational training, including the most advanced ones, as the development of individual development plans for their staff.

Generally, the fact – emphasised in the PARP studies quoted – that it is rather an insignificant group of enterprises who approach vocational training of employees in a strategic and long-term manner, which, among others, is attested by the lack of cohesion between the subject range of training and the skills and qualifications that the employers believe to be necessary for their staff. For example, on any level other than declarative, it was impossible to claim the existence of a link between the employment policy conducted by the employers and their approach to vocational training. It seems that the lack of such a link poses a significant challenge in vocational training.

6. Training activity of people at working age – review of study results

Educational activity of individuals consists of, besides participation in the system of formal education, also participation in the non-formal learning,[43] and independent learning, defined as informal learning. As part of the Study of Human Capital in Poland, the research conducted among people aged from 18 to 64 (including the unemployed) tackled the question of learning activity of individuals covering – besides formal education – also, its two forms listed above, non-formal and informal. The description of education of population (including the unemployed) covered by the study included such questions as:

- The level of participation in non-formal education (taking into account the period of the last 12 months, and the last four weeks).
- Form and subjects range of the most frequently selected training.
- Reasons for embarking and not embarking on education in the non-formal system.
- Costs of the last course/training had, and assessment of its usefulness.
- Level of participation in informal education during the last 12 months.
- Methods and subjects of self-education.
- Desire to receive additional education during the coming 12 months, and demand for specific skills and qualifications that can be acquired in the processes of additional education/training.
- Possession of certificates/licences authenticating rights and/or qualifications, including the types of certificates held.
- Usefulness of the certificates and licences held in professional life.
- The desire to acquire other certificates.

Discussed below are the selected most important results and problem questions related to this subject, including also a general assessment of training activity, detailed analysis of the level of participation of population in informal and non-formal education, and the declared need to receive additional education during the 12 months following the study.

43 Non-formal question is construed, following the definition used in the GUS *Kształcenie dorosłych* study as education that, unlike formal education, does not result in a change in the level of education, is "usually conducted in the form of courses, training, instruction (…), seminars, conferences or lectures, to which the respondent subscribed and in which he or she participated. Counted into this type of education may also be private lessons (e.g. in foreign languages) and also "distance" learning which takes place via mail or electronic media (e.g. computer, video, DVD)." (GUS Report *Kształcenie dorosłych*, p. 17).

6.1. General assessment of the training activity of population

Non-formal education is still hardly popular in Poland, and moreover it is of selective character, mostly due to the place of residence, age, education, and the occupational situation of the potential participants in the processes of the learning process.

Falling back on the studies conducted earlier, it is necessary to account for participation in education and training during the last four weeks, which is one of the main indexes of the development of the lifelong learning area. The postulated value of this index in EU by 2010 amounted to at least 12.5%, and by the 2020 – at least 15%. According to the data from 2009, in Poland, the percentage of people aged from 25 to 64 participating in training or education (during the four weeks before the study) amounted to 4.7%[44]. The level of the index in the case of the studies discussed amounted to approximately 4%[45]. The non-formal education during the 12 months preceding the studies was the option for 13% of people aged from 25 to 64 (N=2311), which is lower by more than five percentage points when compared to the level of participation in non-formal education in 2006 – in line with the results of the GUS study *Kształcenie dorosłych*[46]. Slightly fewer respondents (10.5%) opted for independent learning during the last 12 months (N=1873). The level of participation in informal education in reference to the GUS studies of 2006 dropped by as many as 15 percentage points. Taking into account the declarations of the respondents, 19% of people participated in at least one of two forms of education (informal or non-formal) during the previous 12 months. Nevertheless, a decided majority (over 80%) do not participate in any form of additional education, with the proportion of the educationally passive being higher in rural areas (86%) than in cities (77%) (Table 21).

Table 21

Training activity broken by down by gender and place of residence

	in any form	in non-formal education	in informal education	in no form	N
Men	19%	12%	11%	81%	8874
Women	20%	14%	10%	80%	9030
Country	14%	10%	7%	86%	6721
City	23%	15%	13%	77%	10372
Warszawa	20%	13%	13%	80%	811
Total	19%	13%	10,5%	81%	17904

Source: *BKL Study – General Population Survey* 2010.

Another feature characteristic of the level of additional education in Poland, is its differentiation by age. Considering participation in any form of education, the highest activity (27%) is visible in the youngest age group (18-24), and the lowest – in the oldest age group, that is 60+ (7%). Generally, it is possible to notice that the level of participation, both in informal and non-formal education, diminishes with age (Table 22).

44 According to the data presented in the draft strategic document developed by the Interdepartmental Team for Lifelong Learning, including National Qualification Framework, *Perspektywa uczenia się przez całe życie* of 4th February 2011.

45 The value of the index was estimated for people aged from 25 to 64 learning and declaring participation in non-formal education during the four weeks preceding the study.

46 A study of the Chief Statistical Office (GUS) *Kształcenie dorosłych*, Warszawa 2009, conducted in the 4th quarter of 2006 by representative method in households; it covered 24,800 people aged 25–64.

Table 22

Learning activity vs. the age of the respondent

	in any form	in non-formal education	in informal education	in no form	N
18-24	27%	15%	16%	73%	2676
25-34	23%	15%	13%	77%	4053
35-44	22%	16%	12%	78%	3647
45-49	19%	14%	10%	81%	1648
50-54	15%	11%	7%	85%	2148
55-59	11%	7%	6%	89%	2339
60+	7%	7%	4%	93%	1285
Total	19%	13%	10,5%	81%	17796

Source: *BKL Study – General Population Survey* 2010.

The higher the level of education, the greater participation in the process of additional training. The highest proportion of people embarking on learning, both in non-formal and informal system, is present among people with higher education (42%). People most rarely using the non-formal education are people with basic vocational education (6%), and lower secondary and lower (8%). A similar tendency is visible in the case of independent learning (Table 23).

Table 23

Learning activity vs. the level of education

	in any form	in non-formal education	in informal education	in no form	N
Lower secondary and below	12,5%	8%	5%	87,5%	3559
Basic vocational	8%	6%	3%	92%	4771
General secondary.	22%	12%	14%	78%	2248
Post-secondary, vocational secondary	21%	14%	11%	79%	4555
Higher	42%	31%	26%	58%	2756
Total	19%	13%	10,5%	81%	17889

Source: *BKL Study – General Population Survey* 2010.

General assessment of the training activity of population

The decision to continue learning is made most frequently by people still in education and working. Participating in non-formal education are 17% of people working full-time and 16% of people in education. Similarly, independent learning is the domain of people in education (19%). This result does not surprise, as people who learn, by the very definition of their occupational situation focus on complementing and deepening their knowledge. Learning occurs least frequently in the case of people in retirement and pensioners (slightly over 1%) and homemakers (4%) (Table 24).

Table 24

Learning activity vs. occupational situation

	in any form	in non-formal education	in informal education	in no form	N
Full-time employment	24%	17%	12%	76%	9700
Part-time employment	21%	11%	13%	79%	722
Temporary break in employment	18%	9%	11%	82%	334
Unemployed	14%	10%	7%	86%	1994
Retired/pensioner	4%	1%	3%	96%	2461
In education	30%	16%	19%	70%	1743
Homemaker	8%	4%	5%	92%	820
Total	19%	13%	10,5%	81%	17774

Source: *BKL Study – General Population Survey* 2010.

Over 15% of people the working and the unemployed aged from 25 to 64 participated in training during the last 12 months, while among the inactive people (retired, pensioners, in education and homemakers) the rate was only slightly above 3%. When the period of the last four weeks was taken into account, the proportion of people participating in training in the last four weeks among the working population amounted to 4%, and the unemployed – only to 2.7%.

Broken down by administrative regions, the highest level of participation in training in the period of the last 12 months is visible in Podlaskie (19%), and the lowest in Opolskie (8%), Kujawsko-Pomorskie (9%) and Zachodniopomorskie (also 9%) (Table 25).

Tabela 25

Learning activity by administrative region

	in any form	in non-formal education	in informal education	in no form	N
Dolnośląskie	18%	12%	10%	82%	1380
Kujawsko-pomorskie	13%	9%	6%	87%	974
Lubelskie	21%	14%	12%	79%	991
Lubuskie	22%	13%	13%	78%	483
Łódzkie	21%	15%	11%	79%	1194
Małopolskie	25%	15%	15%	75%	1520
Mazowieckie	19%	13%	11%	81%	2423
Opolskie	12%	8%	5%	88%	491
Podkarpackie	19%	13%	11%	81%	969
Podlaskie	29%	19%	16%	71%	545
Pomorskie	17%	11%	10%	83%	1043
Śląskie	20%	14%	9%	80%	2211
Świętokrzyskie	16%	11%	8%	84%	588
Warmińsko-Mazurskie	21%	15%	9%	79%	672
Wielkopolskie	20%	13%	11%	80%	1608
Zachodniopomorskie	14%	9%	7%	86%	811
Total	19%	13%	10,5%	81%	17904

Source: *BKL Study – General Population Survey* 2010.

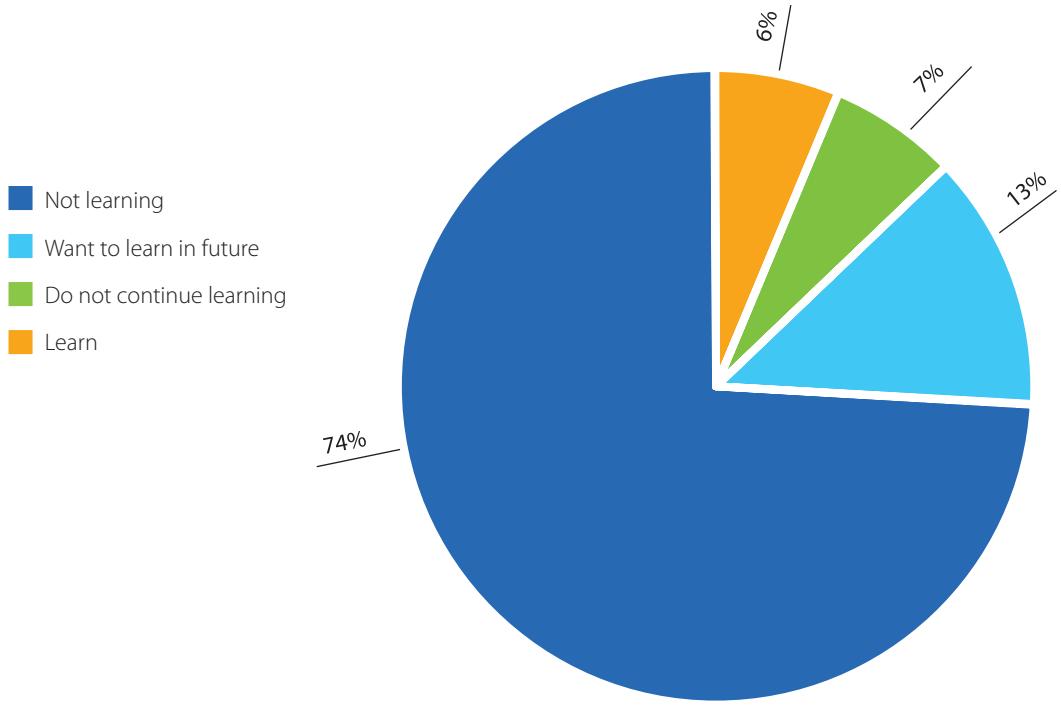
The analysis of the learning process among population presented in the further part of the report accounts for three main dimensions: (1) activity of the trainee in the 12 months following the study in the process of non-formal education, (2) involvement of people in the process of independent learning, and (3) the desire to complement the skills and/or qualifications by participation in training during the following 12 months. Taking into account the dimensions listed above, it is possible to define the attitude of the respondents to learning by distinguishing the following:

- people learning additionally (6%): participants in at least one form of non-formal education during the 12 months preceding the study, and planning to continue learning in the coming 12 months
- people not continuing to learn (7%): learned during the 12 months preceding the study in the system of non-formal education, but are not planning to continue learning during the following 12 months
- people eager to learn in future (13%): did not learn earlier, but would like to start learning in future
- not learning (74%): did not learn earlier and are not planning to do it in the nearest future.

Non-formal education: types and subjects

Chart 50

Attitude to learning among the respondents (in %) (N=17886)



Source: *BKL Study – General Population Survey* 2010.

6.2. Non-formal education: types and subjects

Decidedly most often selected as a form of non-formal education are classroom-based courses/training (70% subscribe to this form). Among the people who participated in courses and/or training, fewer than 9% participated also in training at the place of work, and 6% – in workshops, seminars, and conferences. Least often selected forms of non-formal education are internships, postgraduate studies, and online courses and training.

When it comes to the most often selected subject range of non-formal education, it included: language courses (13%), personal development and general competencies related (13%), construction and industry (11%), medical, related to social work and psychology (9%), education, training, teacher training (8%), driving licence, maintenance and repair of motor vehicles (8%), and IT (7%). The detailed range of subjects selected most often is presented in Table 26.

Table 26

Subjects most frequently chosen in non-formal education

Languages (13%)	• English language (9%) • Other foreign languages (2%) • German language (1%)
Personal development, general competencies (13%)	• Other, related to personal development (9%)[47] • Interpersonal communication (1%) • Seeking employment, writing CVs and motivation letters, job interviews (1%) • Developing personal interests, hobbies (1%)
Construction and industry (11%)	• Other specialist in construction and industry (3%) • Earthmoving, crane, hoist and related plant operators (1%) • Welder (2%) • Stationary plant and machine operator (2%) • Electrical equipment installers and repairers, energy, electric installations, SEP licences (1%) • Electronics, mechatronics, automation (1%) • Gas, heating, sewage, air-conditioning, and ventilation installations (1%)
Medical, social work, psychology (9%)	• Other related to medicine, social work, psychology (4%) • Psychology and psychotherapy (2%) • Specialist medical courses, for physicians (1%) • Paramedics (life-saving) (1%) • Courses for nurses, male nurses, and medical technicians (1%)
Education, training, teacher training (8%)	• Education, training, teacher training: others (5%) • Formal and organisational: organisation of teacher's work (1.5%) • Student/teacher relations, working with children (1.5%) • Examinations, examiner training (1%)
Driving licence, maintenance and repair of motor vehicles (8%)	• Forklift truck operator (2%) • Others for drivers, mechanics, related to transportation, cars, and vehicles (2%) • Category B driving licence, B1 (1%) • Driving licence (no category specified) (1%) • Mechanic, motor vehicle mechatronics service technician, motor vehicle diagnosing and repairs (1%)
IT (7%)	• Information technology: handling specialist software related to the work performed (2%) • Other IT (2%)

Source: *BKL Study – General Population Survey* 2010.

47 While analysing the subject range of the most frequently chosen training, attention must be paid among others to the large proportion of subjects concerning the so-called personal development, encompassing courses of highly varied subject range, including mathematics, chemistry, Polish philology, physics, sign language courses, managerial and general development workshops, and activities related to the development of family skills and personal development (dance, writing, reading).

Non-formal education: types and subjects

Among the number of classroom and online courses, the respondents most often participated in language (15% of classroom and 24 of online courses were language courses) and personal development (12% and 24%, respectively). Courses. Internships and traineeships covered mostly the subjects in construction and industry (20%), and doctoral studies – enterprise management (47%) and law (35%). Majority of training conducted at the place of work were personal development (17%) and questions related to safety at work, first aid, and fire protection (11%), and construction and industry (11%).

Women substantially more often than men opted for activities related to personal development, general competencies, teacher competencies (being chosen by 13% of women and only 2% of men), and related to medicine, social work, and psychology. The domain of men, in turn, was training related to enterprise management, warehousing, logistics and supplies, and maintenance and repair of motor vehicles.

Language training was most often the option for people with lower secondary and lower, and with secondary comprehensive education, and for people from the youngest age group. 25% of people below 24 entered language training, compared with only 4% of the 50+ group. Taking into consideration the popularity of language training among people under 34 years of age, one should not wonder at the fact that in most cases these were the people still in education (33%) who chose those. People with basic vocational education selected mostly courses related to construction and industry. In turn, people with higher education selected training in languages, general development, and related to education and teacher training.

Training was usually the option for the working people, with the largest proportion of trainees embarking on subjects including enterprise management (92%), law (90%), and financial services and real estate (95%). People on full-time employment were the only ones to point at training, including environmental protection and ecology.

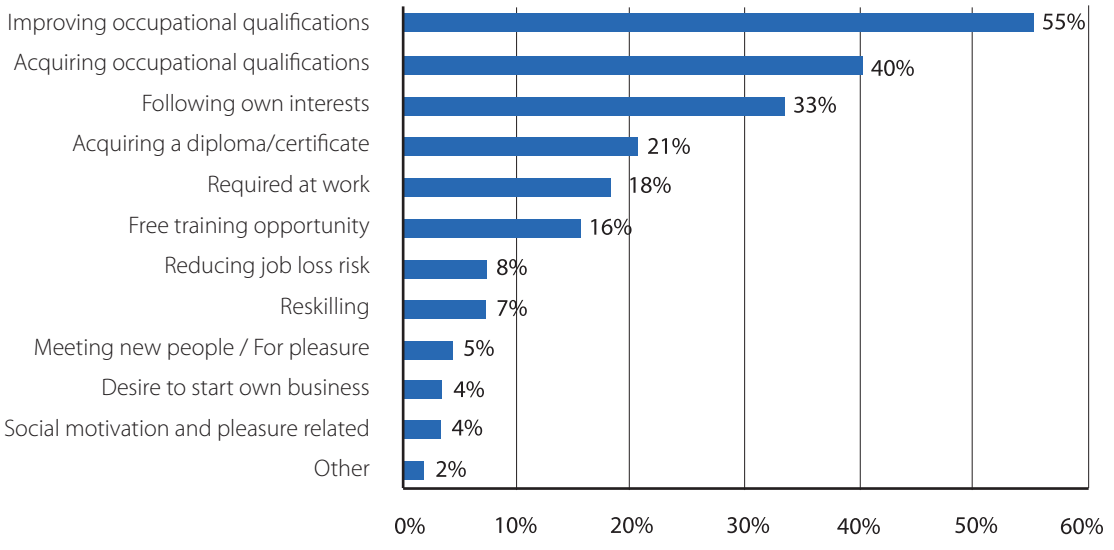
Investigation of participation in the last training or course showed that 40% of them were fully financed by the employer, over 22% – by the respondent, and approximately 24% by another institution, which in most cases was probably the employment agency, as that option was selected by nearly 70% of the unemployed who were learning. A decided majority (95%) of the respondents considered the last training useful. Training that did not end in issuing the participants with a certificate or licence confirming the qualifications or rights gained was more often considered less useful.

6.3. Reasons for entering/not entering training

The respondents were asked also to name the reasons for which they decided to enter (or not) training. People who made the decision to enter additional training, followed mostly the desire or need to improve their qualifications related to their occupation (55%) or to the desire to acquire such qualifications (40%). Of marginal significance was referral from the employment office (4%), desire to start own business (4%), and social motivation and pleasure related to it (5%). The reasons for not embarking on training were also caused by occupational needs. The main cause why people did not enter entering training was because it was not required at work (60%). Of all the respondents, 13% pointed to personal reasons, related to lack of motivation and lack of time. Among others, the respondents pointed mostly to education (27% of those mentioning other reasons), retirement age (25%), and condition of health (22%). Main reasons for non-formal education and lack of activity in the area are presented in the two charts below (Chart 51 and 52).

Chart 51

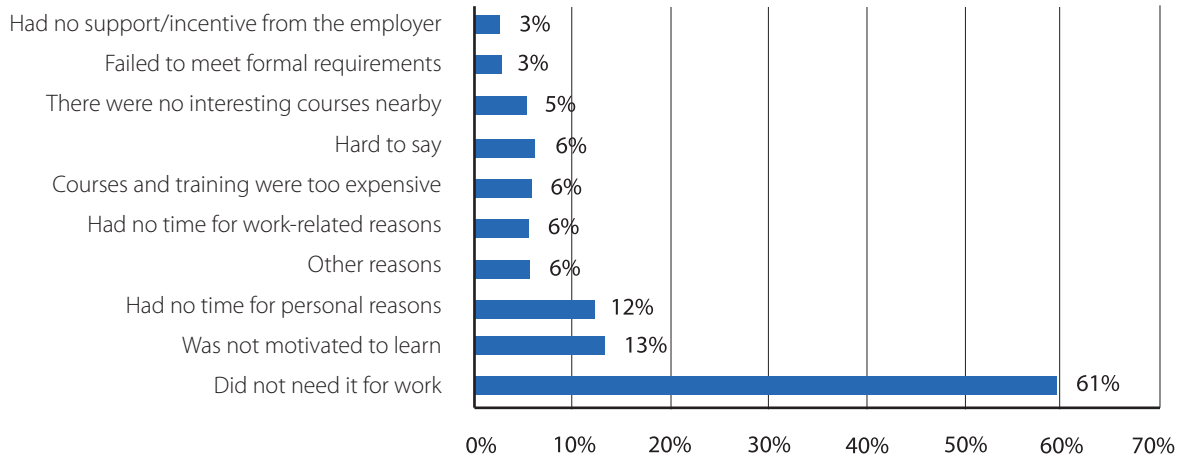
The most important reasons for learning (N=2301)



Source: *BKL Study – General Population Survey* 2010.

Chart 52

The most important reasons for lack of learning activity (N=15605)



Source: *BKL Study – General Population Survey* 2010.

Reasons for entering/ not entering training

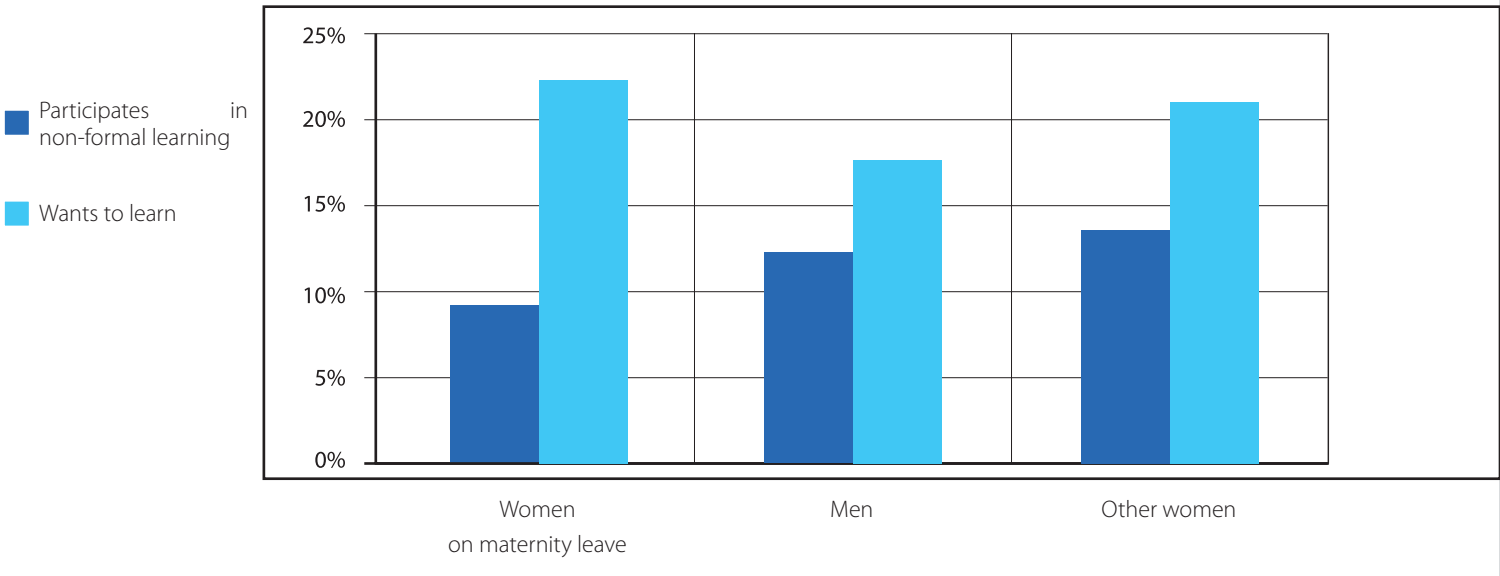
Identification of reasons for the recent absence in the training market is especially significant in reference to the people who due to their social and occupational situation may potentially soon be excluded from the labour market. It is so as the need to learn is mentioned mostly in the context of quick transformations in the labour market, including the demand for specific competencies. Thus, learning is one of the ways to increase one's opportunities to assume a valuable position in the labour market.[48]

Among those threatened with exclusion from the labour market, the following may be pointed to: the young (18-24), the elderly (50+), inhabitants of rural areas, the unemployed, people in poorer health, and finally women on maternity leaves.

People aged from 18 to 24 more often than older people mentioned lack of time caused by personal reasons as the motive for not embarking on training, mentioning and also too high costs of such training. In turn, people 50+ more often than younger ones pointed to the fact that they do not learn because they lack motivation. Residents of rural areas slightly more often mentioned the problem of lack of interest in courses in their vicinity, which is not surprising, when one considers the fact that training firms concentrate in the cities. The people who considered their health situation as poor, rendering their performance of everyday duties difficult to a large extent, hardly ever choose non-formal education. Only 2% of them participated in training during the last 12 months. Among other reasons, these people quoted also the poor health and age. In turn, women in maternity leaves more often than other women and men pointed to personal problems as the reason. Although it does not unambiguously mean that the problem was childcare, this reason was clearly among the dominant here. The interest of women in maternity leave in learning is at a similar level as among other women. In fact, however, their recent training activity was lower than that of other women and men, even though the differences were not large. The fact of being on maternity leave does not influence self-education (Chart 53).

Chart 53

The attitudes to learning among women on maternity leave and other women and men



Source: *BKL Study – General Population Survey* 2010.

48 Strzelczyk-Łucka J. (2010), *Człowiek w obliczu zmian na rynku pracy* [in:] *Life Long Learning – edukacja przez całe życie*, Akademia im. Jana Długosza w Częstochowie, pp. 18–19.

Reasons for entering/ not entering training

People choosing non-formal education may be grouped according to the main reasons for which they become active in this realm. Taking into consideration the reasons for recent training activity, we can distinguish three groups of people:

1. Declaring the desire/need to change qualifications: focused on the gaining new qualifications or developing those already had, or on changing occupational qualifications, or on starting own business. This group includes also people referred by the employment agencies.
2. Choosing a preventive strategy: choosing training due to the risk of losing their job, requirement of the employer, and to a smaller degree – also the eagerness to improve their occupational qualifications.
3. In training for personal reasons: following mostly own motivation and social reasons, eager to meet new people, finding pleasure in development of their own interests, and focused generally on own development and training.

Analysing the argumentation of the people who have not opted for learning during the 12 months preceding the moment of the study, we may distinguish people pointing to:

- external reasons: declaring that they did not learn because they did not meet formal requirements, did not have the support of the employer, and because of the high price and lack of interesting courses
- lack of (internal) motivation: had no time for professional and personal reasons, and had no motivation to training either
- lack of need: not entering training because they did not need it at work they perform.

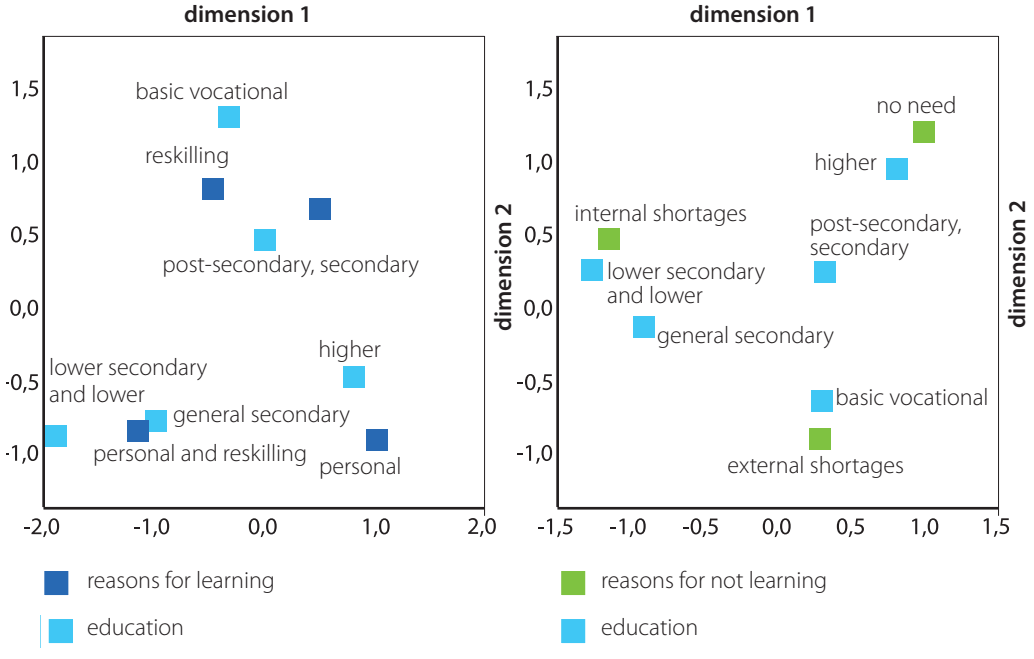
This, naturally, is a simplification, yet it allows a more holistic tackling of the problem of the level of participation in non-formal education. It is so as we can observe, among others, that – while making the decision about training – people with basic vocational education follow usually the desire to change qualifications, i.e. obtain new qualifications, while people with higher education participate in training, both for personal reasons and due to the requirements of staying in the labour market, i.e. among others, meeting the employer requirements and in this way, minimising the risk of job loss.

In turn, among the people inactive in the training market during the 12 months before the study, people with higher education did not learn mostly because they did not find it useful at work. Thus, in the context of stimulating training activity, one should – chiefly in the case of the unemployed with higher education – focus not as much on the reinforcement of personal motivation but rather on the training policy of the employers. In turn, lack of personal motivation is the domain of people with lower secondary and lower education. Worth emphasising here is the fact that among the people with this level of education, approximately 30% are retired, 20% are unemployed, and 14% are the people who still learn, that is the groups potentially threatened by exclusion from the labour market.

The relationships between the categories listed above are presented in the Figure 3.

Figure 3

Reasons for entering and not entering training vs. the level of education of the respondents



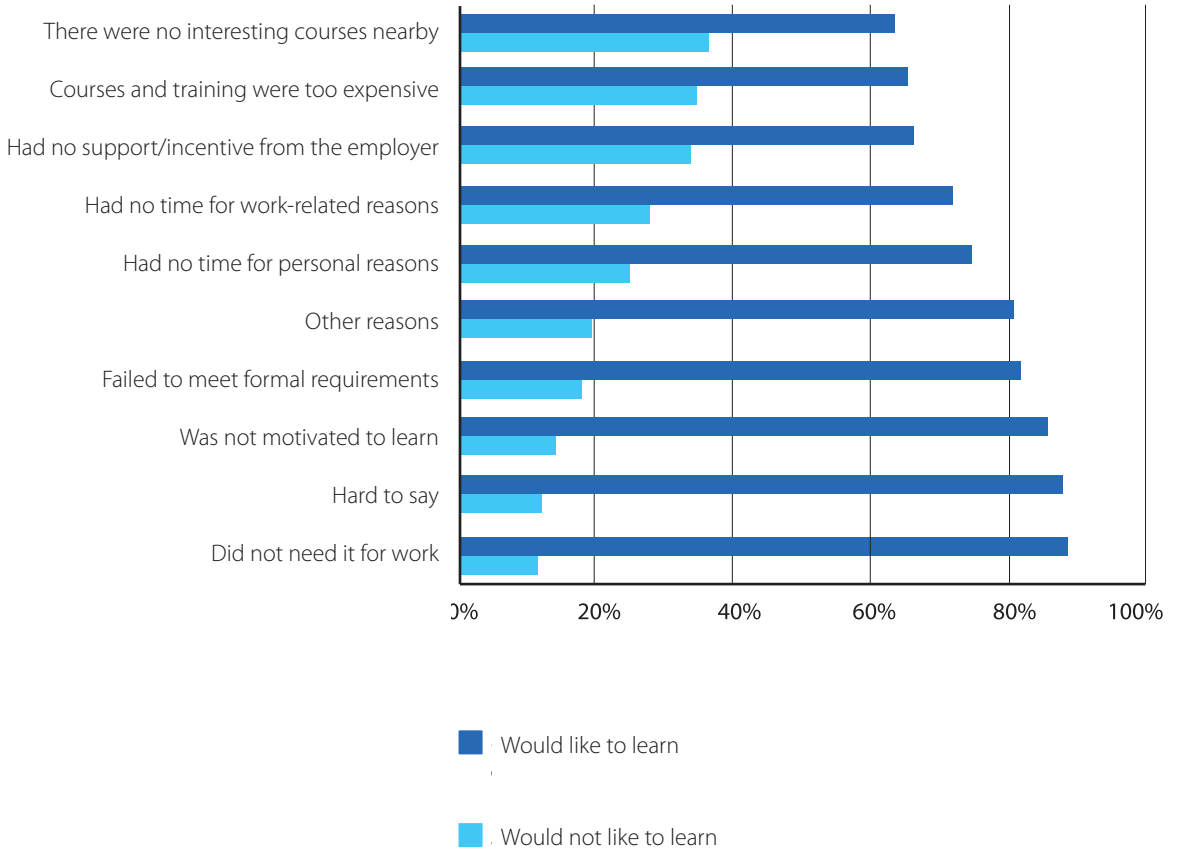
Source: *BKL Study – General Population Survey* 2010.

6.4. Demand for training

The investigation of demand for qualifications and/or skills of a given type concerned, among others, the interest in learning during the coming 12 months, and the subject range being in such demand. More than 19% of the respondents declared that they are eager to learn in future. Taking into account the previous training experience, slightly more than 6% of the entire study group would like to continue learning (i.e. participated earlier in training and would like to continue it), 7% of the respondents do not plan to continuing training, 13% did not participate in training at earlier but would like to learn in future, and a decided majority (74%) did not participate in training and have no such plans for the coming 12 months. Among the people who trained earlier, every other (49%) expressed the desire to continue education. In turn, among the people who did not participate earlier in non-formal education, not fewer than 85% are not planning to learn, also in the near future. The people who did not enter training during the last 12 months, mostly due to external factors (including: lack of interest in courses nearby, too high costs of training, and lack of support from the employer – over 30% in each of the groups) declare eagerness to learn in future, relatively more often than others, who did not embark on training for other reasons (Chart 54).

Chart 54

People who did not learn for certain reasons, and their plans for future (N=15594)



Source: *BKL Study – General Population Survey* 2010.

As far as qualifications and/or skills that the respondents would like to acquire by participating in non-formal education are concerned, the ones mentioned most often included language (23%), construction and industry (12%), IT (16%), related to driving licence, maintenance and repair of motor vehicles (10%), specialist, occupational (9%), and related to services (7%). The detailed subject range of the areas selected most often is presented in Table 27.

Table 27

Thematic areas of qualifications and skills in demand among people who want to learn

Languages (23%)	• English language (15%) • Other foreign languages (5%) • German language (2%) • Spanish language (1%)
Construction and industry (12%)	• Earthmoving, crane, hoist and related plant operators (4%) • Other specialist in construction and industry (3%) • Welder (2%) • Electrical equipment installers and repairers, energy sector workers, electric installations, SEP licences (1%) • Stationary plant and machine operator (1%)
IT (16%)	• Information technology: computer literacy (e.g. Word, Excel, Power Point) (11%) • Information technology – programming (2%) • Information technology: using specialist software related to the job (2%) • Other IT (1%) • Computer graphics (0,5%)
Driving licence, maintenance and repair of motor vehicles (10%)	• Forklift truck operator (4%) • Driving licence (no category specified) (2%) • Category B driving licence, B1 (1%) • Category B +E, C+E or D+E driving licence (1%) • Category C driving licence, C1 (1%) • Motor vehicle mechanics and repairers, motor vehicle mechatronics service technicians, motor vehicle diagnosing and repairs (1%)
Specialist, occupational (9%)	• Occupational licences, qualifications (8%)
Related to services (7%)	• Beautician, hairdresser, artistic make-up (4%) • Tour courier, guide, tourist guide (1%) • Trainer, instructor (1%) • Other related to food service activities, tourism, and recreation (1%)

Source: *BKL Study – General Population Survey* 2010.

Decidedly, most eager to learn are people with higher education (34%), while the relatively lowest interest in learning is recorded among people with vocational (12%), and lower secondary and lower education. Most interested in learning in the near future are the people who remain in education (27%). Interestingly, these are the unemployed who are also most eager to enter training (approx. 27%), and least interested in it are the retired (5%). Comparing the level of interest in additional education during the 12 months following the study among the individual regions of Poland, we can observe that most eager to learn are the inhabitants of the north-western region (28%), while least interested in obtaining qualifications and skills during the coming year were the residents of Wielkopolskie (16%) and the western region (17%). The differentiation of the demand for the most frequently mentioned qualifications and skills in individual groups is presented in the Figure 4.

Figure 4

The demand for the most frequently mentioned qualifications in individual groups of respondents

Languages	men (20%)	women (25%)					
	temporary break (29%)	learning (36%)	homemaker (28%)	working part-time (24%)	working full-time (22%)	unemployed (13%)	retired (17%)
	higher (27%)	comprehensive secondary (33%)	post-secondary, vocational secondary (21%)	lower secondary and below (20%)	basic vocational (15%)		
	country (18%)	city (25%)					
construction and industry	men (25%)	women (2%)					
	unemployed (19%)	temporary break (29%)	working full-time (13%)	working part-time (9%)	retired (8%)	learning (6%)	homemaker (4%)
	lower secondary and below (25%)	basic vocational (24%)	post-secondary, vocational secondary (12%)	comprehensive secondary (9%)	higher (4%)		
	city (17%)	country (11%)					
IT	men (17%)	women (15%)					
	retired (39%)	working part-time (23%)	homemaker (23%)	unemployed (21%)	temporary break (14%)	working full-time (14%)	learning (10%)
	basic vocational (25%)	post-secondary, vocational secondary (17%)	comprehensive secondary (16%)	lower secondary and below (15%)	higher (11%)		
	country (17%)	city (16%)					
Driving licence	men (17%)	women (4%)					
	unemployed (16%)	temporary break (15%)	learning (12%)	working full-time (9%)	retired (8%)	working part-time (7%)	homemaker (3%)
	basic vocational (21%)	lower secondary and below (19%)	post-secondary, vocational secondary (9%)	comprehensive secondary (6%)	higher (2%)		
	country (13%)	city (9%)					
Specialist, occupational	men (9%)	women (9%)					
	working part-time (12%)	working full-time (11%)	unemployed (6%)	homemaker (6%)	learning (5%)	retired (4%)	temporary break (3%)
	higher (13%)	post-secondary, vocational secondary (10%)	comprehensive secondary (6%)	lower secondary and below (6%)	basic vocational (5%)		
	city (9%)	country (7%)					
Related to services	women (11%)	men (3%)					
	homemaker (17%)	retired (13%)	working part-time (11%)	temporary break (11%)	unemployed (11%)	learning (8%)	working full-time (5%)
	basic vocational (12%)	lower secondary and below (10%)	comprehensive secondary (9%)	post-secondary, vocational secondary (8%)	higher (1%)		
	country (9%)	city (7%)					

Source: *BKL Study – General Population Survey* 2010.

6.5. Participation in the processes of learning vs. the situation of the unemployed

While analysing participation in the process of learning, attention should be paid to the unemployed. The acquisition and/or development of the qualifications and skills can be useful for this group in the process of changing their current occupational situation. As part of the Study of Human Capital in Poland, besides research among people aged from 18 to 64, studies were conducted also among the unemployed registered in employment offices (N=8122). Such a study allowed among others a closer look at the situation of the unemployed in the training market, and their attitude to learning among others. In the group of the registered unemployed, 22% undertook any actions aimed at learning (within the system of informal and non-formal education), 16% learnt at courses, training, private lessons, and postgraduate studies, and 8% of all the respondents learned on their own. Approximately 8% participated in non-formal training during the last 12 months, and at the same time planned to continue learning in the nearest future. In turn, 20% – though not in active training during the previous 12 months – would like to enter such training. Nevertheless, 55% did not participate in learning and are not planning to.

As far as the last training was concerned, the costs were financed by the institution (most probably by the employment office) in case of 70% of respondents. Only in 17% of cases, the respondents financed courses and training on their own. A decided majority recognised the last course held as useful (90% among the people who entered training). Considered hardly useful were as a rule the courses that did not let their participants acquire a certificate or a licence, which is precisely the same in the case of the general opinion of the learning people.

Among the unemployed registered in employment offices, much like in the general society, people with a diploma of an institution of higher education were the ones who learnt most often (24%), while those who learnt least often were people with lower secondary and lower, and basic vocational education (approx. 12% in either case). In the past, the unemployed women entered training more often than men, yet in the case of independent learning men were slightly more active. Characteristic of the unemployed seeking employment for seven months or longer was higher training activity. Especially standing out as far as the level of education is concerned (accounting for education both in non-formal and informal system) are the Łódzkie (35%), and also Wielkopolskie (30%), Podlaskie (29%), Podkarpackie (28%), and Śląskie (27%) administrative regions. The lowest activity of unemployed is registered in the Mazowieckie (11%), Zachodniopomorskie (14%), and Dolnośląskie (15%) administrative regions (Table 28).

Table 28

Learning activity of the unemployed by the administrative region (N=8121)

	in any form	in non-formal education	in informal education	in no form	N (Total)
Dolnośląskie	15%	12%	5%	85%	641
Kujawsko-pomorskie	19%	15%	6%	81%	565
Lubelskie	22%	17%	6%	78%	483
Lubuskie	22%	16%	8%	78%	251
Łódzkie	35%	25%	14%	65%	569
Małopolskie	18%	13%	6%	82%	568
Mazowieckie	11%	9%	4%	89%	1004
Opolskie	21%	15%	12%	79%	200
Podkarpackie	28%	18%	14%	72%	588
Podlaskie	29%	22%	9%	71%	257
Pomorskie	22%	15%	10%	78%	440
Śląskie	27%	21%	9%	73%	761
Świętokrzyskie	25%	19%	7%	75%	354
Warmińsko-mazurskie	19%	14%	7%	81%	432
Wielkopolskie	30%	15%	20%	70%	576
Zachodniopomorskie	14%	9%	8%	86%	432
Total	22%	16%	9%	78%	8121

Source: *BKL Study – General Population Survey* 2010.

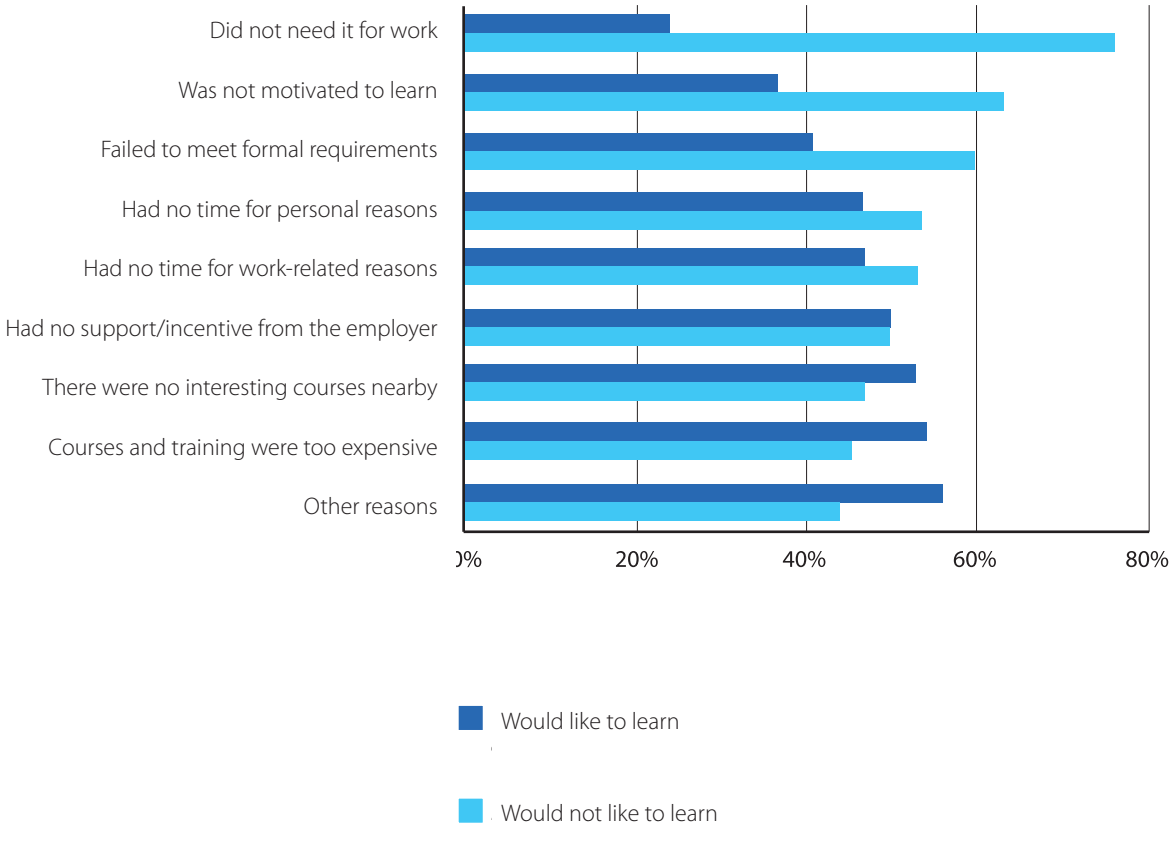
Participation in the processes of learning vs. the situation of the unemployed

The unemployed decided to enter training mostly to acquire occupation related qualifications (64%) or to improve the qualifications they already had (31%), while the furthering of their interests (24.5%) ranked lower. In this aspect, they do not differ significantly from the motivation characteristic of the part of the population that opted for training in the last 12 months.

The main reason why the unemployed did not decide to enter training was – much like in the case of the results of general population – the lack of such need (45%). Ranking further among the unemployed were lack of time and motivation (approx. 16% in either case), that is factors more closely related to the personal approach to learning. In turn, the people who previously did not embark on training for the reasons of external nature – including too high costs of courses, and lack of appropriate courses in the vicinity – would like to learn in future more often than the respondents pointing to internal factors. Also those who pointed to other reasons (including usually lack of openings, lack of courses (approx. 30%), learning (20%), rearing children (12%), and health (9%)) were in most cases also among those who wanted to learn (Chart 55).

Chart 55

The reasons why the unemployed did not learn, and their plans for the future (N=7984)



Source: *BKL Study – General Population Survey* 2010.

The scope of qualifications or skills that the unemployed planning to learn during the coming year want to acquire is similar to the range of the most popular training subjects mentioned above. In future education, the unemployed would first of all like to acquire the following qualifications and skills: IT (20%), related to maintenance and repair of motor vehicles (19%), construction and industry (16%), related to services (16%), language (14%), and related to trade, sales, and customer care (12%). Especially eager to acquire IT qualifications and skills are people seeking employment as technicians, associate professionals and service and sales workers, and people with secondary, and secondary vocational education (approx. 26%). Language qualifications and skills are sought predominantly people with higher education, more often, women than men, seeking employment as professionals and clerical support workers. The greatest demand for driving licences, and repair and maintenance of vehicles was reported by men, and the youngest (under 24) with lower secondary and lower education.

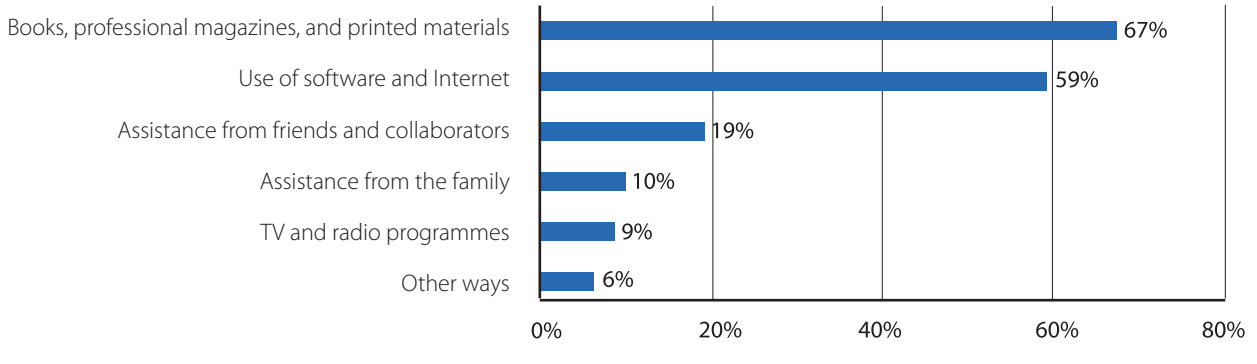
Accounting for the previous learning activity of the unemployed and their coming plans related to education, the desire to continue gaining qualifications or skills was declared in most cases by people with higher education (16% of them were learning during the previous 12 months, and planning to continue learning during the following year), and the people seeking employment as specialists (15%). Least focused on learning were the unemployed with lower secondary and lower education, not seeking work and seeking work as skilled and unskilled workers (more than 60% did not learn and were not planning to learn in future).

6.6. Informal education: types, and range of subjects

The most frequently selected methods of independent learning include seeking knowledge in books, professional magazines, and printed materials (67%), and the use of software and Internet (59%). Nearly 53% of the people learning independently opt for more than one form of learning. Among the people using books, professional magazines, and printed materials as the source of knowledge, 60% use also, computer software and the Internet as a method of self-education. Relatively less frequently, they decide to ask friends and collaborators (15%) and family (7%) for help. Moreover, 11% of them select also TV and radio programmes (Chart 56).

Chart 56

Methods of self-education and types of assistance (N=1873)



Source: *BKL Study – General Population Survey* 2010.

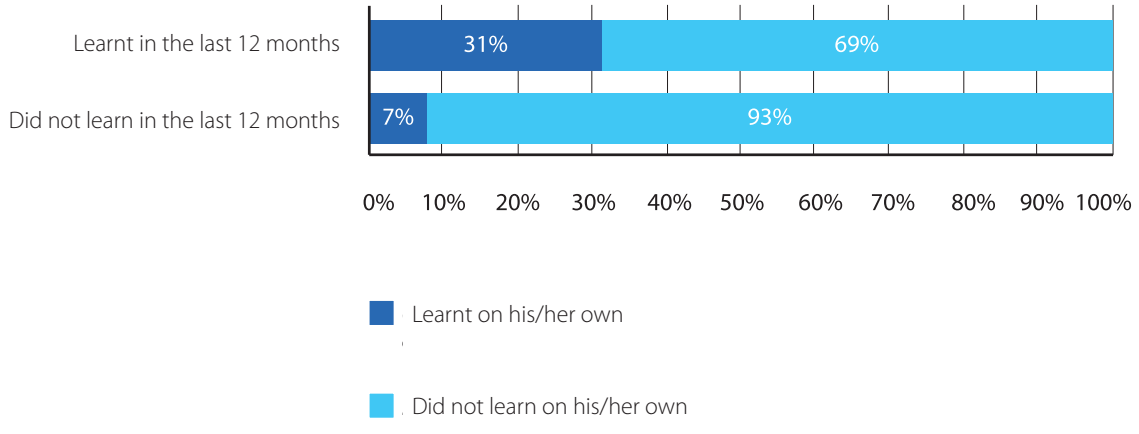
Informal education: types, and range of subjects

Much like in the case of non-formal education, these are the women and people with higher education (60%) who choose more than one method of self-education. Women more often than man use the individual types of assistance, with the exception of the assistance from colleagues, which is more frequently resorted to by men (22%). People with higher education (slightly over 6%) and people on full-time employment (8%) relatively least frequently opt for assistance from the family. The main recipients of such assistance are people with lower secondary and lower (16%) and basic vocational (15%) education, and the retired and pensioners (28%). In turn, television and radio provide the source of knowledge mostly to the unemployed (14%), and homemakers (16%). The latter – besides people with a temporary break in employment (63%) – more often use numerous methods of learning on their own (65%). The size of the place of residence and the region are not significantly distinctive as far as preferences concerning the methods of independent learning are concerned, even though in the rural areas, the Internet still remains a less frequently used source of knowledge than in urban areas, even though it is the second most popular source of information selected.

Among the people who participated in non-formal education during the previous 12 months, slightly more than 30% were also learning independently. The people who at the same period did not participate in non-formal education did not, as a rule, embark on an informal education either (93%) as shown in the Chart 57.

Chart 57

Participation in non-formal education vs. learning of one's own (N=17904)



Source: *BKL Study – General Population Survey* 2010.

As far as knowledge and skills that the respondents developed by learning independently are concerned, most frequent were languages (21%), IT (14%), other specialist, occupational (12%), related to construction and industry (10%), personal development than general competencies (8%), and law (6%). A detailed range of subjects is presented in Table 29.

Table 29

Subjects characteristic of independent learning: types and range of subjects

Languages (21%)	• English language (14%) • Other foreign languages (3%) • German language (2%) • Spanish language (1%)
IT (14%)	• Information technology: computer literacy (e.g. Word, Excel, Power Point) (6%) • Information technology: using specialist software related to the job (3%) • Information technology – programming (3%) • Other IT (2%) • Computer graphics (1%)
Specialist, occupational – other (12%)	• Occupational qualifications, licences (12%)
Construction and industry (10%)	• Other specialist in construction and industry (4%) • Electronics, mechatronics, automation (1%) • Electrical equipment installers and repairers, energy, electric installations, SEP licences (1%) • Stationary plant and machine operator (1%) • Gas, heating, sewage, air-conditioning, and ventilation installations (1%)
Personal development and general competencies (8%)	• Other related to personal development (4%) • Development of interests, hobbies (3%) • Interpersonal communication (1%)
Law (6%)	• Other legal (5%) • Labour law (1%) • Tax law (1%)

Source: *BKL Study – General Population Survey* 2010.

Acronyms used in the report

BHP – *Bezpieczeństwo i Higiena Pracy* – safety at work
CKP – *Centrum Kształcenia Praktycznego* – practical training centre
CKU – *Centrum Kształcenia Ustawicznego* – lifelong education centre
ESF – European Social Fund
ODZ – *Ośrodek Dokształcania Zawodowego; Ośrodek Doskonalenia Zawodowego* – vocational training and/or education centre
PARP – *Polska Agencja Rozwoju Przedsiębiorczości* – Polish Agency for Enterprise Development
PIFS – *Polska Izba Firm Szkoleniowych* – Polish Chamber of Training Firms
RIS – *Rejestr Instytucji Szkoleniowych* – register of training institutions
SEP – *Stowarzyszenie Elektryków Polskich* – Association of Polish Electrical Engineers
SIO – *System Informacji Oświatowej* – system of educational information
GUS – *Główny Urząd Statystyczny* – Central Statistical Office

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The Polish Agency for Enterprise Development (Polska Agencja Rozwoju Przedsiebiorczosci, PARP) is a government agency reporting to the Minister of Economy. It was established on the power of the Act of 9th November 2000. The task of the agency is to manage funds received from the State Treasury and the European Union allocated to manage entrepreneurship and innovativeness and to develop human resources.

For over a decade, PARP has supported entrepreneurs in implementing competitive and innovative projects. The goal of the agency is to conduct programmes aimed at developing the economy, supporting innovation and research activity in small and medium-size enterprises (SMEs), regional development, growth of export, development of human resources, and the use of new technologies.

The Agency's mission is to establish favourable conditions for sustained development of the Polish economy by supporting innovation and international activity of businesses and promotion of environmentally friendly forms of production and consumption.

In the financial perspective 2007–2013, PARP is responsible for the implementation of tasks in three operational programmes: **Innovative Economy**, **Human Capital**, and **Development of Eastern Poland**.

One of the Agency's priorities is the promotion of innovative attitudes and encouraging entrepreneurs to apply state-of-the-art technologies in their businesses. To achieve this, PARP operates a web portal devoted to innovation – **www.pi.gov.pl** – and organises the annual competition **Polish Product of the Future (Polski Produkt Przyszłości)**. Representatives of SMEs are welcome to participate in regular meetings of the **Club of Innovative Enterprises**. The objective of the educational portal **Akademia PARP** (PARP Academy, www.akademiaparp.gov.pl) is facilitation of access and dissemination of business knowledge through e-learning among micro-, small and medium-sized businesses. Moreover, PARP supports the development of e-business through its website **web.gov.pl**. Operating at the agency is a centre of the **Enterprise Europe Network**, offering entrepreneurs information on EU law and the principles of conducting business in the Single Market.

PARP initiated the development of the **National SMEs Service Network (Krajowy System Usług, KSU)**, which helps business start-ups and companies developing their business activity. In over 150 KSU centres (including KSU Consultation Points, KSU National Innovation Network, and loan and guarantee funds collaborating within the KSU) situated all over Poland, enterprises and start-ups are welcome to acquire information, participate in training on how to run business, and receive loans and/or guarantees. Besides the above, the agency runs the KSU website (www.ksu.parp.gov.pl). PARP's regional partners in the implementation of selected activities are the Regional Financing Institutions (RFIs).

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