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Authors of the report:

Elena Rizova, Assoc. Prof. Universiy "Ss. Cyril and Methodius", Faculty of philosophy - Skopje

Lindita Qazimi, director of Adult education Centre

Rametula Abduraimi, Adult Education Centre

Irena Milkov, Adult Education Centre

Maja Krstevska, Adult Education Centre

Mevljane Zulfikjari, Adult Education Centre

MA Liljana Lazova, Adult Education Centre

Halit Jonuzi, Adult Education Centre

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The positions expressed within this analysis are the sole responsibility of the authors and do not necessary represent the opinions and the policy of the Project, the project implementing bodies and the donor.



CONTENT

1. IMPORTANCE OF THE NON-FORMAL EDUCATION AND TRAINING AND ITS MARKET-ORIENTEDNESS AND INCLUSIVENESS	11
2. CONDUCTING OF THE RESEARCH	15
3. RESULTS	21
3.1. Labour market-orientedness of non-formal education and training programmes	21
Offer of services/training in non-formal education	23
Interest for the offered services/trainings in non-formal education	25
3.2. Inclusiveness of the non-formal education and training programmes	33
3.3 Implementation of the non-formal education and training programmes	39
3.4 Cooperation within the social environment	41
CONCLUSIONS AND RECOMMENDATIONS	45
LITERATURE	49

Abbreviations

AE – Adult education

AEC – Adult Education Centre

ESARNM – Employment Service Agency of the Republik of North Macedonia

ILO – International Labour Organisation

NFET – Non-formal Education and Training

PIU – Project Implementation Unit of E4E@mk

SVET – Secondary Vocational Education and Training

SVS – Secondary vocational schools

VET – Vocational Education and Training

VETC – Vocational Education and Training Centre

Key concepts:

Non-formal Education and Training providers:

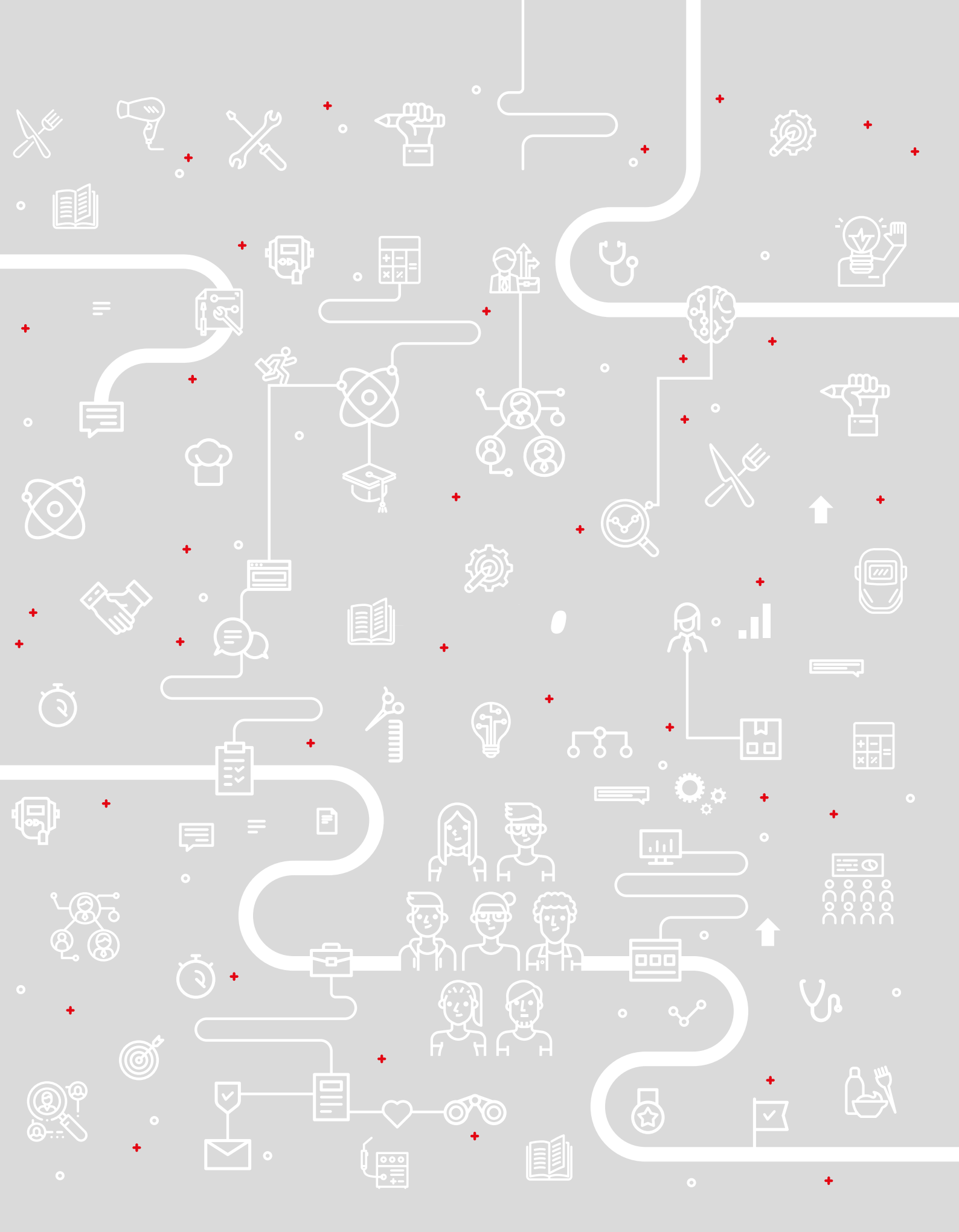
- a) NFET provider can be school, higher education institution, as well as specialized adult education institution, and
- b) NFET provider can be legal or personal entity which is registered in the area of the adult education.

Users of the non-formal education and training/

Learners are participants in the trainings organized by verified NFET providers

In the Report, according to the context in the sentence, the following terms are used as synonyms:

- a) service providers in the NFET, NFET providers, training providers;
- b) users of services in the NFET, participants in the trainings, end users.



INTRODUCTION

Given the established cooperation with the country and the longstanding support to the Republic of North Macedonia, the Swiss Agency for Development and Cooperation (SDC) launched the Project “Education for employment in North Macedonia” (E4E@mk)¹ in the beginning of March 2018. The main goal of the E4E@mk project is to contribute to more gainful employment of youth and specifically vulnerable groups, in a socially inclusive and sustainable way.

This is expected to be achieved through a more market-oriented provision of non-formal education and training (NFET), strengthened cooperation between the formal vocational education and training (VET) and the private sector especially in terms of practical training of the students, as well as improved framework conditions as basis for development of the vocational skills.

In the first phase (2018-2022) the project will focus on 7 economic sectors (Health and social care, Personal services, Food processing and technology, Agriculture, Machinery, and Electrotechnics – IT profiles) in four regions in the country (Southeast, Southwest, Polog and Skopje region). The project is implemented by Helvetas Macedonia in partnership with the Macedonian Civic Education Center and the Economic Chamber of Macedonia, and in close cooperation with the Ministry of Education and Science, The Ministry of Labour and Social Policy, the Vocational Education and Training Centre, Adult Education Centre, the business sector and other relevant governmental bodies and non-governmental organizations.

¹ Hereinafter referred to as E4E@mk or “the Project”

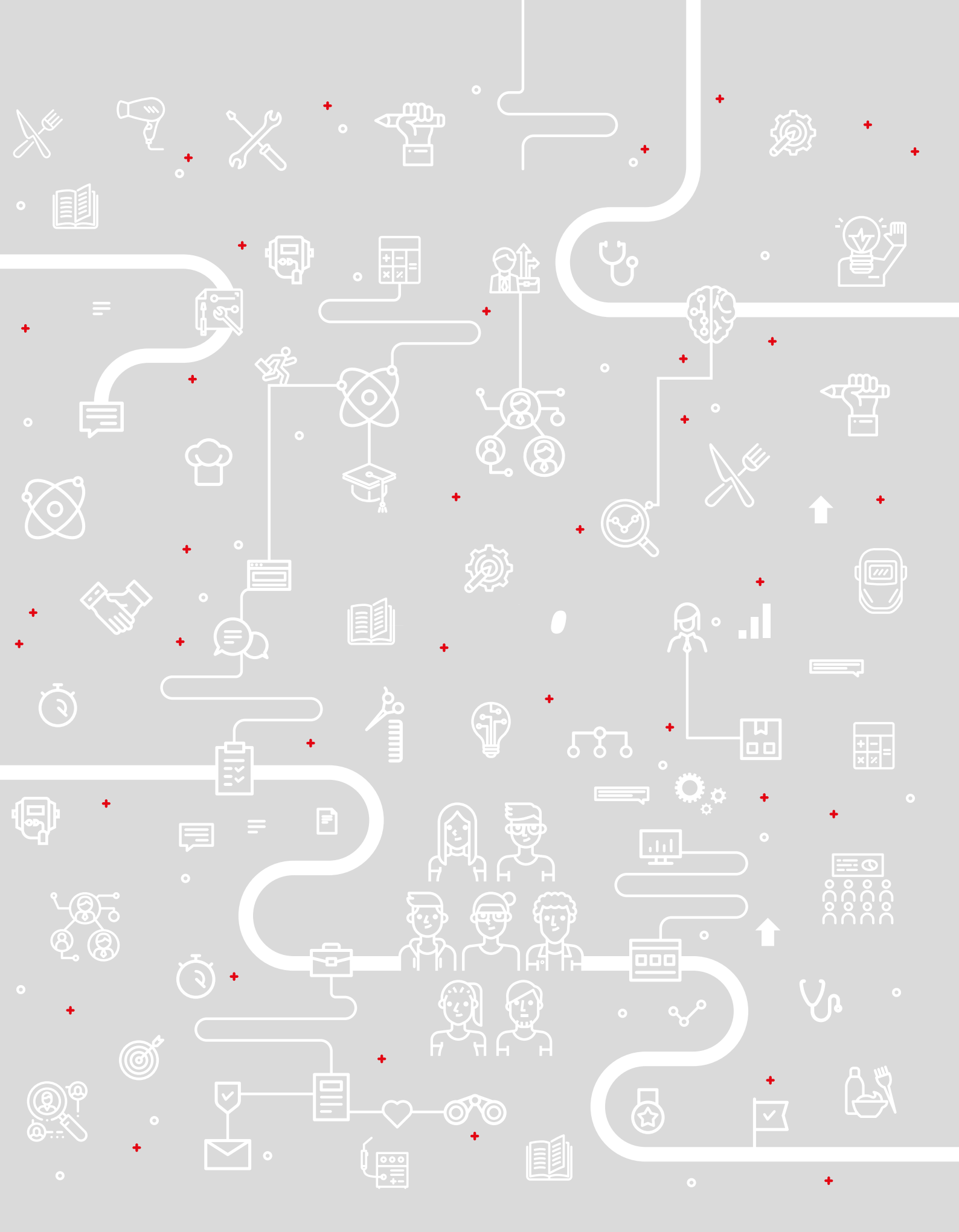
One of the starting points of the Project was to gather relevant information about the current situation and the views of the NFET users (learners) and providers on the labour market-orientedness and inclusiveness of the trainings. Having in mind the Project systemic approach, the E4E@mk project unit (PIU) has assigned the task of conducting the research to the Adult Education Centre (AEC) team and provided them external support as well.

The research activities included consultations and assessment of the views/opinions of all stakeholders in provision and implementation of the programmes (verified NFET providers, learners, municipalities and secondary vocational schools), with focus on non-formal education and training providers and on users of the NFET.

The research team has designed and used several instruments for gathering data: from verified NFET providers, learners, representatives from formal VET schools; representatives from municipalities that offer NFET programmes; as well as conducted focus groups with representatives of NFET providers. All the data has been gathered through appropriate software and field work.

In addition to the views obtained in response to questions in the questionnaires, qualitative research (interview and focus groups) and review of literature and relevant previous research were used, to achieve an appropriate methodological objectification of the received data.

This report derives from the analysis of the collected data and intends to answer questions that would help in conducting Projecta activities in improving the overall functioning of the NFET, in terms of effectiveness, relevance, inclusiveness and quality.



1 IMPORTANCE OF THE NON-FORMAL EDUCATION AND TRAINING AND ITS MARKET-ORIENTEDNESS AND INCLUSIVENESS



The rapid changes in the demand of new skills and competences on the labor market, as a result of the significant development of techniques and technology, put the education system (especially VET and AE) ahead of a major challenge. – *How to provide young people with skills and competences needed for the labor market of the future?*

European and world economies increasingly rely on the power of non-formal education and training to fill the gaps of the formal education, as well as to “keep pace” with new and modern occupations emerging from the new way of living, learning and working. Through the NFET system, both youth and adults can acquire and advance their competences, gain an appropriate qualification and thus become competitive on the labor market. NFET also contributes to one’s personal development and fulfillment, as well as active citizenship. This is possible due to its flexibility and capability for faster adaptation to the needs of the learners, as well as to the needs of the employers.

Today, more than ever, it is crucial that all citizens receive high quality education and training in order to equip themselves with the key competences needed in order to be economically active and employable, and to improve their

whole life. Consequently, each country should focus on continuous development of its workforce through enhancing their knowledge and providing them skills and competences which can not be acquired only through the formal education system.²

We live in times of increased economic turbulence accompanied by crises, and with needs that are difficult to predict. In 2012, the world faced serious challenges in terms of employment and shortage of vacant job positions. The three years of crisis that followed have increased the number of unemployed persons for 27 million people since the onset of the crisis, which according to the ILO projections will grow and might reach near 200 million unemployed persons globally in 2019.³

In 2017, more than 80 million young people aged 15-24 were unemployed globally. The global youth unemployment rate of 13.4% is two percent higher compared to the percentage before the economic crisis⁴. In the analysis of the International Labor Organization, it is noted

² Ministry for education and science of Republic of North Macedonia, Strategy for vocational education and training in context of lifelong learning 2017-2020, Skopje: MoES, CVET and ETF.

³ ILO World Employment and Social Outlook: Trends 2019, International Labour Office, Geneva.

⁴ International Labour Organization, ILOSTAT database. Data retrieved in September 2018.

that labor market inequalities persist based on gender, age, sector and other grounds. Gender differences are particularly important as there is still a significant difference in the unemployment rate among males and females at global level (more than 26%), which means that gender discrimination is still present not only in underdeveloped and developing countries, but also in the developed countries around the world. The lack of employment opportunities for young people is also one of the major global challenges in the field of labor. Employment opportunities for young people are much lower than the opportunities for adults (an unemployment rate of 13% of youth and 4.3% of adults).

The demographic trends characterized by growing percentage of adult population also contribute to increased labor market pressure. Namely, as a result of human's life expectancy and the decreased population growth in the world, this significant decline is expected to continue in the next few decades. In developed countries around the world, it is estimated that in 2030, five out of ten workers will be over 65 years old, compared to 3.5 workers out of ten in 2017⁵. This means that new challenges arise ahead of the adult population that force them to modernize their competences according to the innovations and the structural changes in the labor market.

In the Republic of North Macedonia, according to the latest estimation of the population⁶ (as of 31.12.2017), there are 2.075.301 inhabitants, and according to the gender structure 50.1% are men and 49.9% are women. The average age of the population is 39 years, with an aging population trend. Because of this, attention should be given to the issue of improving living and working conditions for young people. According to the analysis: "Severity of the issue of excluded young people in Macedonia from Education, Trainings

and Employment: How to cope with? [2017, B. Novkovska]⁷, *"the share of young people aged 15-24 years in the total working age population is in constant decline. Thus, the share in 2016 was 16.3%, compared with 19.0% in 2011. At the same time, the participation of young people on the labor market shows that 68.7% are inactive; 16.2% are employed and 15.1% are unemployed; women are less active on the labor market and are less likely to find employment than men. The unemployment rate for young people (15-24 years) in Macedonia was 48.2% in 2016 and is significantly above that of the EU countries where the average unemployment rate is 18.7%".*

At the same time, vocational education and training is subject to a series of reforms over the past decade and today. Namely, the Strategy for Vocational Education and Training 2013-2020 detected numerous weaknesses in the context of lifelong learning and paved the path for development of VET in the country according to the European and world trends. The World Bank have supported the VETC to develop a Concept for Modernization of Technical⁸ Education; standards for qualifications are being developed according to the European guidelines for creation of adaptive and competitive labor force, etc. The strategic changes in VET is expected to result in flexible and transparent education based on the principles of lifelong learning tailored to individual needs and labor market needs, both at national and local level. VET and non-formal education and training shall support the socio-economic development of the Republic of North Macedonia, offering the students/learners the opportunity to acquire knowledge, skills and competences necessary to enter the labor market, but also provide them opportunities for continuous education.

⁵ World employment social outlook – trends 2018, International labour office, Geneva.

⁶ http://www.stat.gov.mk/Publikacii/MakStat_IzBOR_2018.pdf

⁷ Severity of the Issue of Excluded Young People in Macedonia from Education, Trainings and Employment: How to Cope With? UTMS Journal of Economics 8 (3): 295-306., Blagica Novkovska. 2017.

⁸ Four-year secondary VET

Having in mind the importance of the AE as a strategic element for the economic and social development of the country, there is still lack of orientation and interest towards it, but also lack of commitment to its development. This aggravates the situation with the poor educational structure of the population in the country, insufficiently effective restructuring of the workforce, as well as lacking greater opportunities for genuine protection of the marginalised groups. AE needs to be reaffirmed as a benefit for the society as it is part of the global economic development policies. The principle of inclusiveness in VET and AE means involvement of all, and raising higher awareness of interconnectedness, dependence and solidarity regardless of race, gender, social, ethnic, religious or cultural background, social background or health situation, difficulties or disabilities. Inclusiveness means providing access and conditions for genuine involvement and putting efforts so that all students / learners achieve results in the process of learning and training⁹.

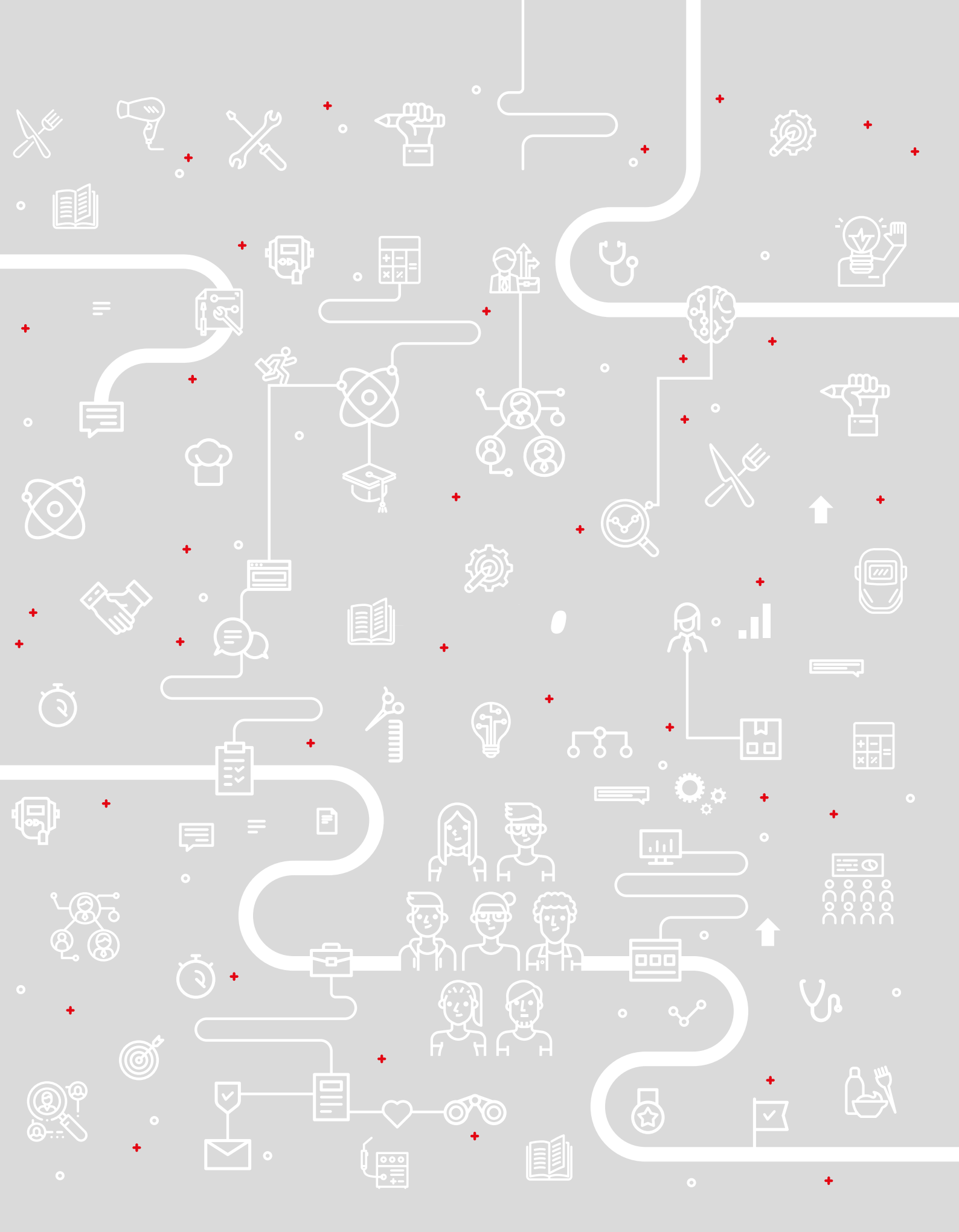
Adult Education Survey¹⁰ in Republic of North Macedonia conducted in 2016, provided an overall picture about the population participating in adult training:

- ▶ Overall participation in non-formal education and training of population aged 26-64 is only 12.7%.

- ▶ From a territorial perspective there's a clear gap between urban population (76% of the people benefiting adult education) and rural population.
- ▶ The split according to educational background shows that: 59% of the relevant population has tertiary and higher education background, 38% has a secondary education background and only 3% have a lower educational background.
- ▶ There is a minimal gender gap (46% females).
- ▶ The status of most people participating in adult education is employed person (79%), only 14% of the beneficiaries are inactive, and only 7% are unemployed.

⁹ According to the OECD's three-part system for determining people requiring greater inclusion which covers the following categories (in particular in education and training systems): A / Handicap: Disabled persons / disadvantaged persons viewed from a medical aspect as organic disorders which are a consequence of organic pathologies (for example, in terms of sensory, motor or neurological disadvantages). It is considered that the person's need arises mainly from problems that can be attributed to such a disability. B / Difficulties: Persons / students with behavioral disorders or emotions, or specific learning disabilities. Difficulties are mainly related to the interaction between the person / student and the environment / educational context. C / Disadvantages: Persons / disadvantaged students who mainly derive from socio-economic, cultural and / or linguistic factors.

¹⁰ Adult Education Survey, 2016 – Source: State Statistical Office



2 CONDUCTING OF THE RESEARCH



The research on market-orientedness and inclusiveness of the non-formal education was carried out in three phases:

- ▶ The first phase covered the identification of the relevant methodology, designing the instruments and detecting the target groups of respondents (the sample of the
- ▶ The second phase covered the data collection;
- ▶ The third phase covered the data/information analysis and interpretation of the results.

Sample

In the non-formal education system - adult education, in the Republic of North Macedonia, in 2017, and 2018, a total of 125 NFET programs were verified and a total of 1534 users of the services (participants in the trainings) were registered.

The sample used in the survey is stratified according to the E4E@mk Project relevant sectors and regions¹¹, but also tailored according to the data available in the AEC for verified service providers and users (participants in the trainings) who attended training for non-formal education.

The data available to the AEC showed the following situation in 2017 up to September 2018 in the

sectors and regions:

- ▶ 31 service providers were active, 29 of which were covered by the survey (93.54% of active service providers), including 7 secondary vocational schools which are verified service providers;
- ▶ The total number of participants in the trainings was 432 for which a data-base was created with the help of the providers; 113 (or 26.15%) participants in the training were involved in the survey;
- ▶ In the four regions there are 10 urban areas, and the survey includes representatives from Ohrid, Struga, Tetovo and the City of Skopje; and

¹¹ Sectors: Health and social care, Personal services, Hospitality, Agriculture, Food processing and technology, Machinery, and Electrotechnics - IT profile; Regions: Southeast, Southwest, Polog and Skopje.

- ▶ The data were collected from representatives of 6 secondary vocational schools who are not verified providers of services for informal adult education.

Additionally, representatives from 23 NFET providers from the four regions were included within the focus groups.

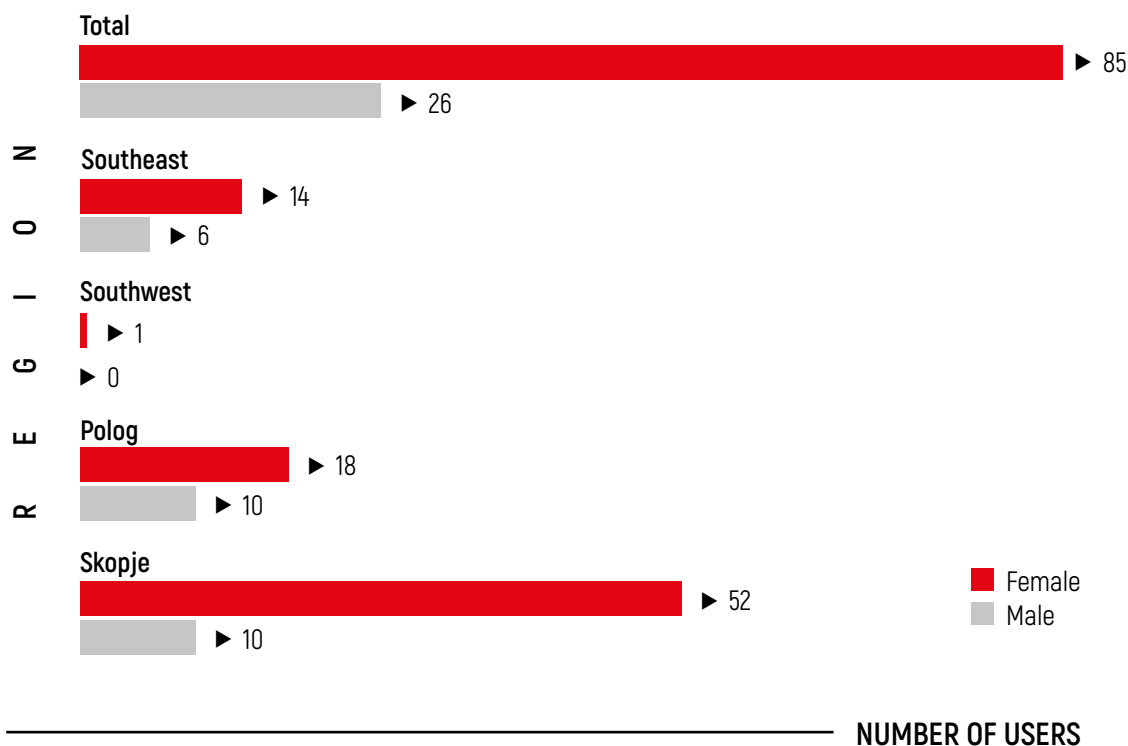
Regional distribution of the respondents/NFET users who responded to the questionnaire according to the gender are given in Table 1 and Graph 1 (two of the users do not specify gender).

The secondary vocational schools with verified programs for the NFET involved in the survey, are from the following regions: Southeast (2 schools), Polog (2 schools) and Skopje region (3 schools).

Table 1: Percentage of learners included in the research by region and gender

Gender	Skopje Region	Polog Region	Southwest Region	Southeast Region	TOTAL
Male	38,5 %	38,5 %	0,0 %	23,1 %	100%
Female	61,2 %	21,2 %	1,2 %	16,5 %	100%

Graph 1. Number of learners by region and gender



Research Instruments

For data collection, two types of instruments were used to obtain methodological triangulation during data processing: questionnaire-scaler and protocol for structured interview. Four questionnaires were prepared for the four target groups of the sample (more details in Table 2): verified NFET providers; beneficiaries of NFET programmes (learners); representatives from the municipalities, and representatives from the VET schools.

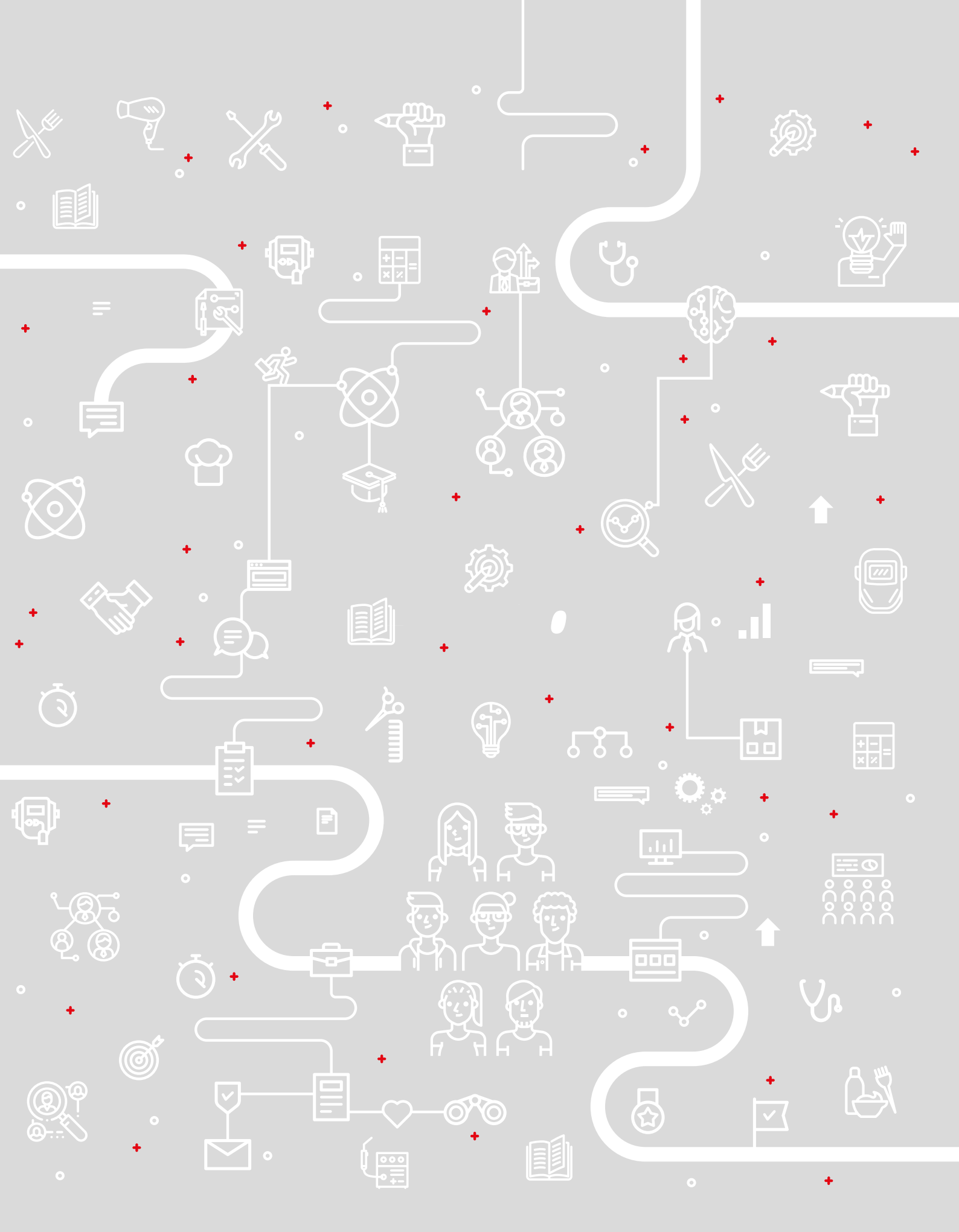
The questionnaire administration was electronically in October and November 2018.

Specific qualitative data were collected through interviews, namely 4 focus groups with NFET providers from the four Project regions were conducted.

Table 2: Description of the research instruments

Code	Respondents	Instrument description
AA	NFET providers	<ul style="list-style-type: none"> ▶ Eight questions aimed to collect general information (status of the organization, region, for which sector/profile do they offer trainings, sector/profile with the highest number of participants in 2017 and 2018, total number of training programmes offered, means of selection of the trainings offered, number of participants and information related to: gender, socio-economic status, ethnicity, disability, employment status). ▶ Five-degree Likert Scale with 14 questions aimed to collect specific information regarding labor market-orientedness, inclusiveness and quality of the offer.
AE	NFET providers	<ul style="list-style-type: none"> ▶ Structured interview aimed to collect general information (status of the organization, region, for which sector/profile do they offer trainings, sector/profile with the highest number of participants in 2017 and 2018), as well as 5 discussion topics leading to obtain information regarding labor market-orientedness, inclusiveness and quality of the offer.
AB	VET schools	<ul style="list-style-type: none"> ▶ Five questions aimed to collect general information (municipality, sectors/profiles provided in the school, sector/profile with the highest number of students in 2017 and 2018, total number of students that have finished school in 2017 and number of enrolled students in 2018, and information related to: gender, socio-economic status, disability, ethnicity). ▶ Five-degree Likert Scale with 15 questions for specific information regarding labor market-orientedness, inclusiveness and quality of the offer.
AC	Learners (participants in NFET programmes)	<ul style="list-style-type: none"> ▶ Nine questions aimed to collect general information (gender, age, region, ethnicity, level of education, for which sector/profile was the training, status of employment, information about the training). ▶ Five-degree Likert Scale with 11 questions for specific information regarding labor market-orientedness, inclusiveness and quality of the training.

-
- AD Municipalities
- ▶ Five questions for collecting general information: municipality, for which sector/profile are offered trainings, sector/profile with the highest number of participants in 2017 and 2018, total number of training programmes offered, total number of participants and information related to: gender, socio-economic status, rural/urban area, ethnicity, disability, employment status).
 - ▶ Likert Scale with 7 questions for collecting specific information regarding labor market-orientedness, inclusiveness and quality of the offer.
-



3 RESULTS



The analysis and interpretation of the data is focused on providing answers to the research questions related to the four indicators:

1. Market-orientedness of non-formal education and training programmes.
2. Inclusiveness of non-formal education and training programmes.

3. Implementation of non-formal education and training programmes.
4. Cooperation with a wider social community.

3.1. Labour market-orientedness of non-formal education and training programmes

The labor market-orientedness of the NFET programmes is one of the key indicators for success, attractiveness and placement of the human capital on the labor market. Although this issue is very complex and requires in-depth research and analysis of the employer's perceptions as a "end users", in this research we tried to assess the perceptions of the target groups (training providers and users of the training/learners) on the market-orientedness of the NFET programmes.

The labor market-orientedness of the programmes offered by the NFET providers means that it needs to be two-way: on one hand oriented to the learners/participants in the trainings, and on the other hand oriented to the employers' needs.

Regarding the orientedness of the NFET programmes towards the labour market, i.e the companies' demand, each of the instruments had a set of questions. When analyzing the answers, an

aggregated index of the corresponding questions (items) was made, and an additional calculation on the degree of the agreement of the respondents on scale 1-4 (the answers in the category "I do not have an opinion" were recoded). More detailed description of the questions in the ques-

tionnaires used for the market-orientedness index is given in Table 3.

The responses of the respondents are presented in Graph 2.

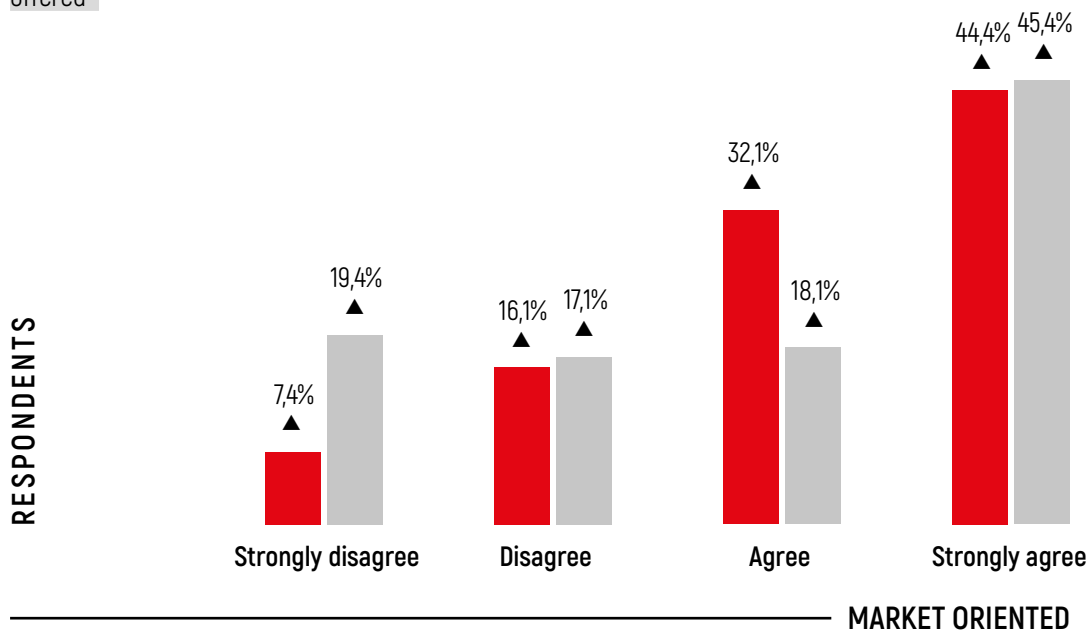
Table 3. Questions related with labor market-orientedness

Code	Respondents	Description of the items in the instrument
AA	NFET providers	<ul style="list-style-type: none"> ▶ Labor market demand for the programmes offered. ▶ Topicality of the programmes offered. ▶ Use of analysis, consultations with employers and higher education institutions regarding the needed/deficient cadre in the state. ▶ Use of modern tools, materials and equipment according to the needs of the workplace.
AB	Secodary vocational schools	<ul style="list-style-type: none"> ▶ Labor market demand for vocations/profiles offered by the school ▶ Topicality of curricula and/or need for adjustment. ▶ Consultations with employers and higher education institutions regarding the deficient cadre in the state. ▶ Use of modern tools, materials and equipment according to the needs of the workplace. ▶ Practical training in companies. ▶ Possibilities of employing students in the relevant occupation/profile.
AC	Learners	<ul style="list-style-type: none"> ▶ The gained knowledge and skills have helped them to secure employment/advance in the workplace. ▶ Need for upgrade of their competences to secure employment/advancement in the workplace. ▶ Use of modern tools, materials and equipment during the training according to the needs of the workplace.
AD	Municipalities	<ul style="list-style-type: none"> ▶ Labor market demand in the municipality for the programmes offered ▶ Topicality of the programmes offered. ▶ Use of analysis, consultations with employers regarding the deficient cadre in the municipality.

Based on the index it is concluded that:

- ▶ 44.4% of the NFET providers strongly agree that the offer is labor market-oriented; and
- ▶ 45.4% of the learners strongly agree that the training they have completed is labor market-oriented.
- ▶ In addition to the great consent in the categories of responses: "strongly agree" and "disagree" between providers and users, it can be concluded that NFET providers are not critical enough in terms of their own offer.

Graph 2. Provider's and user's level of agreement on labor market-orientedness of the programmes offered



Furthermore, in this part of the report, the aspects and responses of the respondents, are analyzed in detail regarding the labor market-orientedness of the programmes.

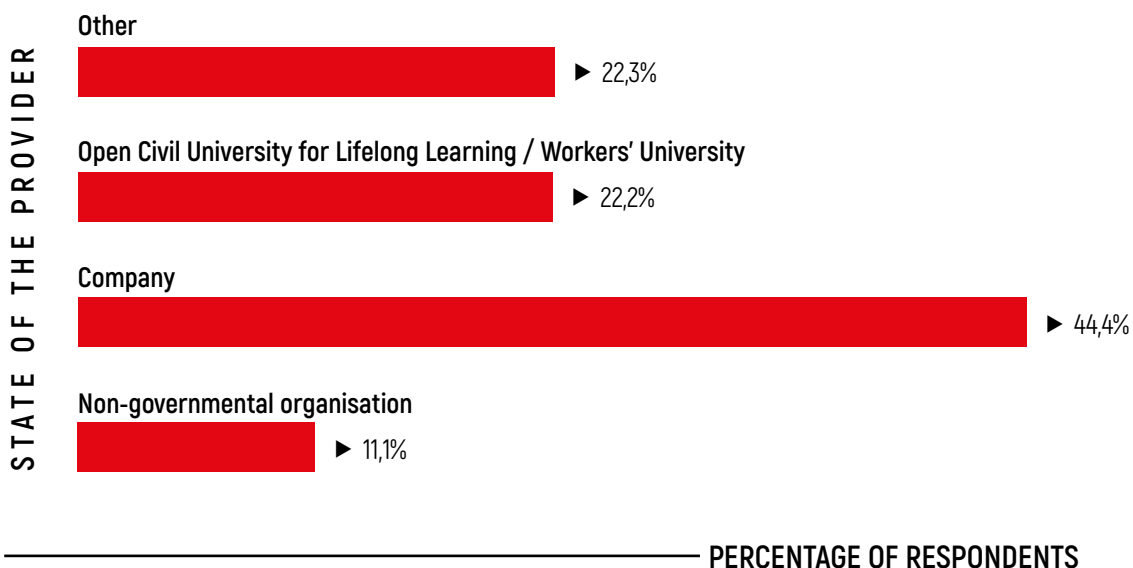
Offer of services/training in non-formal education

According to the Law on Adult Education, different types of institutions can be NFET providers. The law prescribed that: a) adult education institution can be school, higher education institution, as well as specialized adult education institution, and b) adult education institution can be a legal

entity or a person which is registered in the area of adult education.

The status of the NFET providers, included in this research, according to their answers on the questionnaires is given in the Graph 3.

Graph 3: Percentage of NFET providers according to the status of their organization



PERCENTAGE OF RESPONDENTS

The graph shows that most of the NFET providers that were included in to the research are companies, part of them are open universities for lifelong learning, while the smallest part of them are non-governmental organizations. In the category "other", the providers specified - chambers and associations for education and training.

Regarding the regional distribution of NFET providers, most of them are in the Skopje Region (60%), some of them are in the Polog (30%) and

Southeast (10%). There are no verified NFET providers in the Southwest Region.

Regarding the sector in which the trainings are offered by the NFET providers, according to the answers of the respondents, half of the offer are trainings in the Personal services sector, while smaller percentage of the offer are trainings in the following sectors: Food technology/processing, Hospitality and Health and social care. In the category "other", specific profiles also from the Personal services sector, were listed.

Table 4: Sectors in which NFET providers offer training programmes

Sector	% of NFET providers
Personal services	50,0%
Hospitality	20,0%
Health and social care	10,0%
Other	20,0%

The respondents/NFET providers in the Project regions, in 2017 and 2018 did not offer trainings in the following sectors: Machinery, Agriculture, Food processing and technology, and Electrotechnics-IT profiles.

According to the answers from the VET schools – NFET providers, they offer programmes in the Health and social care sector (66.7%), while fewer of them provide programmes in the Information technology. In the category “other” were noted programmes in Traffic and Machinery sector. The answers from the municipality show that they

mostly offer NFET programmes in the Health and social care sector, as well as programmes that do not fall into the listed sectors of the questionnaire, such as chimney sweeper for housing facilities using solid and liquid fuel, tourism and local economic development (TLED), etc.

The total number of NFET programmes offered by the interviewed NFET providers in 2017 and 2018 was 45, which also indicates that one NFET provider offers several verified programmes.

Interest for the offered services / trainings in non-formal education

Regarding the interest of the learners for NFET, 60% of the training providers stated that in 2017 and 2018 the greatest interest was for trainings in the Personal services sector, which seems rational considering that most of the providers offer programmes in this sector. The rest are in the Hospitality sector (20%), Health and social care (10%) and 10% in the category “Other”.

The respondents from the municipalities stated that the greatest interest among the learners was for foreign languages courses, chimney sweepers and profiles in the Machinery sector. On municipality level, a total of 28 NFET programmes were implemented in 2017 and 2018 and a total of 1904 learners were trained.

The structure of the learners involved in the trainings in 2017 and 2018, according to the NFET providers, is given in the following table:

Table 5: Structure of the learners in NFET programmes trained in 2017 and 2018

Structure of the trained * persons	% of the total number of trained persons
Females	66,7%
Persons from disadvantaged socio-economic background	66,7%
Persons with disabilities/difficulties	3,2%
Persons from Roma ethnicity	14,2%
People from rural areas	66,7%
Employed	38,1%
Unemployed	61,9%

* One person may appear in more than one category.

According to the data provided by the NFET providers (Table 5), it can be concluded that many of the learners were persons from disadvantaged and/or marginalized categories.

The structure of students in secondary schools included in the research does not differ too much in terms of the structure of learners in NFET. The table below shows the percentage of students according to the categories in the questionnaire for VET schools that provide NFET programmes.

It can be noted that persons with disabilities/difficulties are not involved in the schools that respond on the questionnaire, and persons of Roma ethnicity are represented with very small percentage (which is also related to the general participation of Roma students in secondary education). Unlike the participants in the NFET programmes, the VET schools have a smaller percentage (10.1%) of students from disadvantaged socio-economic background. Both types of trainings (in the formal and non-formal system) in the sample (regions and sectors) are dominated by the female population.

Table 6: The structure of students in the secondary vocational schools for 2017 and 2018

Structure of students *	% of the total number of students
Females	60,3%
Persons from disadvantaged socio-economic background	10,1%
Persons with disabilities/difficulties	0,0%
Persons from Roma ethnicity	1,1%
Persons from rural areas	42,2%
Employed persons (if the school is verified as a NFET provider	0,0%
Unemployed persons (if the school is verified as a NFET provider)	0,0%

* One person may appear in more than one category.

How providers decide about their NFET offer

In order to gather information to what extent do the NFET providers consider the labor market demand for certain profiles, the providers were asked on which way they collect information about the needs for a particular programme. The answers provided are given on table 7.

Table 7: Means of receiving information on the need for a specific NFET programme

Answers from the respondents	% of providers
Own labor market demand survey	60,0%
Data from the Employment Service Agency	10,0%
Interest and demand from potential future participants in the training	20,0%
Needs for trainings of the donors in the Republic of Macedonia	10,0%
Needs and requirements of the local self-government	0,0%
Programmes supported by the Government of the Republic of Macedonia	0,0%

It can be concluded that when choosing a training offer, NFET providers are usually guided by their own assessment for the labor market needs, and they do not use additional reports or in-depth analysis that indicate deficiency of certain professions and occupations. Also, it is evident that either there is weak cooperation, or no cooperation

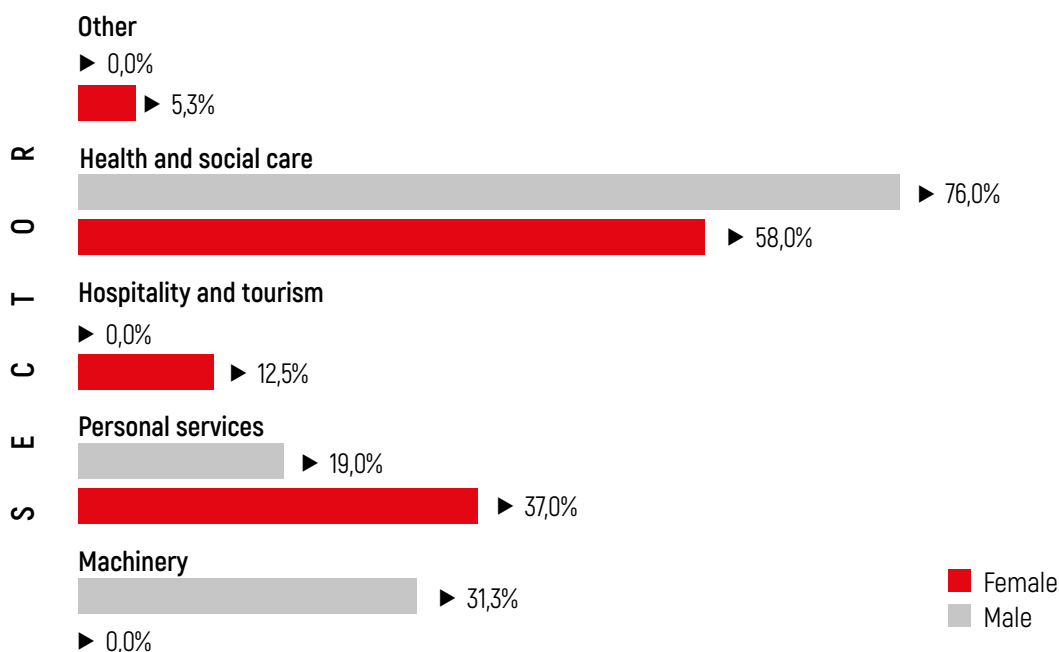
at all, between the local self-government/municipalities and the NFET providers in order to have accurate assessment of the needs of local businesses. In addition, it is evident that the NFET providers are not using the support provided by the Government for implementation of programmes.

Characteristics of the NFET users / learners

The findings regarding the gender of the learners, based on the responses provided by the NFET providers (Table 5), were confirmed by the answers provided by the learners. The female population is dominant with 76% versus the male population with 24%.

Regarding the preferences of the sector of the trainings by male and female respondents, it can be concluded that the female population is interested in the so-called "female" professions in the Personal services sector, as well as Health and social care, while the male population chooses trainings in the Machinery and Agriculture sector.

Graph 4: Participation in trainings by sector and gender



PERCENT OF USERS

The Graph 4 presents the answers to the question: *In which sector is the training that you attended?*

Regarding the interest of the employed/unemployed respondents to acquire and/or improve their competences through the NFET programs, we can conclude that the category of unemployed respondents is dominant. This is logical since they have the greatest need to improve their competences and to be accepted on the labor market.

We should not underestimate the number of employed respondents who attended the training for the NFET, which means that there is a need for improvement/or an awareness of the need for life-long learning in the personal and professional life.

The Table 8 shows the data for employed and unemployed participants in the trainings by gender.

Table 8: Percentage and number of learners according to employment status and gender

	Employed		Unemployed		Total number
Male	37,1%	11	63,0%	17	28
Female	38,9%	33	61,2%	52	85
Total		44		69	113

It is evident that most of the learners are unemployed and the female participants are dominant again. There is no statistically significant difference in terms of employment status of the participants by gender.

Compatibility of NFET offer with labor market demand

The questionnaire included specific questions that referred to the labor-market orientedness of the NFET offer. The data obtained from all four categories of respondents are in the direction that the offered NFET programmes are compatible to the labor market demand.

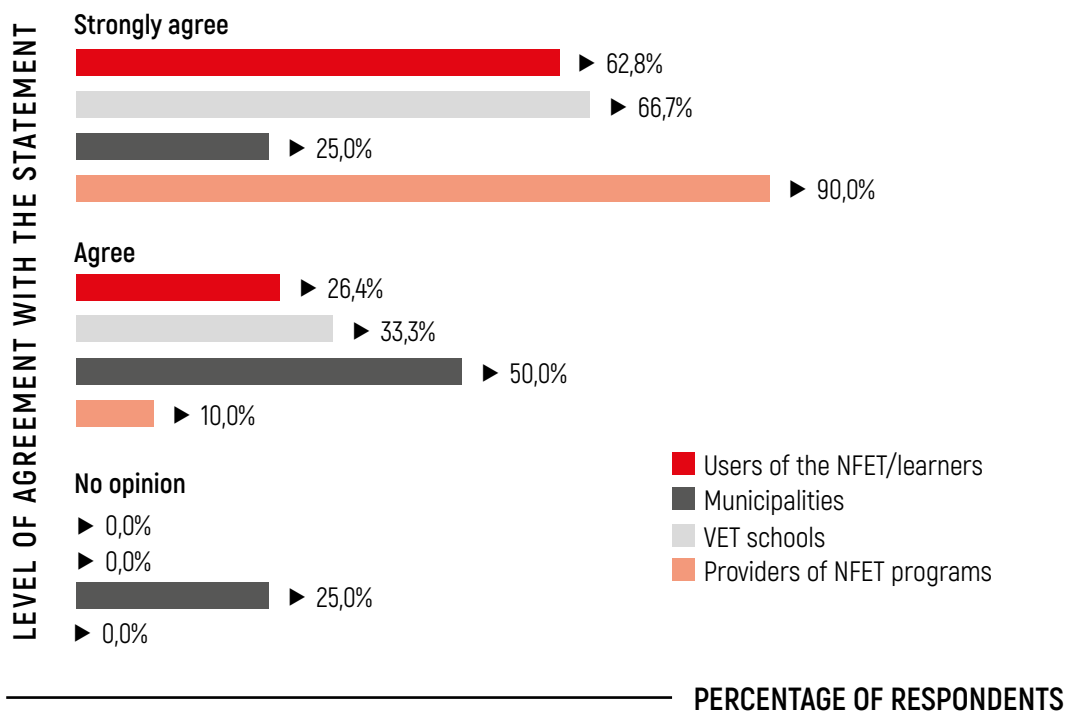
Namely:

- ▶ 90% of the NFET providers stated that they fully consider the labor market demand when designing the training offer.
- ▶ Two thirds of the respondents from secondary VET schools completely agree that the profiles offered in their schools are in demand, while others generally agree.

- ▶ Most of the respondents from the surveyed municipalities completely agree that in their municipality the programmes offered are in accordance with the labor market demand.

The above statements were supported by the opinion of the users of the NFET who answered that they agree that *the knowledge, skills and attitudes that they gained in the training are modern and in accordance with the demand on the labor market.*

Graph 5: Level of respondents' agreement about the market-orientedness of the NFET offer (there are no answers in the categories "strongly disagree" and "disagree")



The analysis of the focus group discussions with representatives of NFET providers regarding the market-orientedness of their programmes confirms the abovementioned stances. In addition, most of the NFET providers stated that part of the programmes are oriented for the Western European labour-market, and thus many of the learners go to work in some of the European countries after successfully completing the training. Consequently, an initiative arose, before the preparation of the programmes the NFET providers to carry out a research for the labor market demand and to develop the programmes based on the results of the research. It was also stated that some of the providers make basic analyzes

for their own needs, and some simply follow the needs of the clients they cooperate with.

It is interesting that the biggest number of the respondents from secondary vocational schools, stated that *the students are easily employed in the appropriate vocation / profile after completing their education*. This, along with the previously analyzed responses, is contrary to the unemployment data provided by ESA and to the results of the 2016 Tracer study¹² where according the data

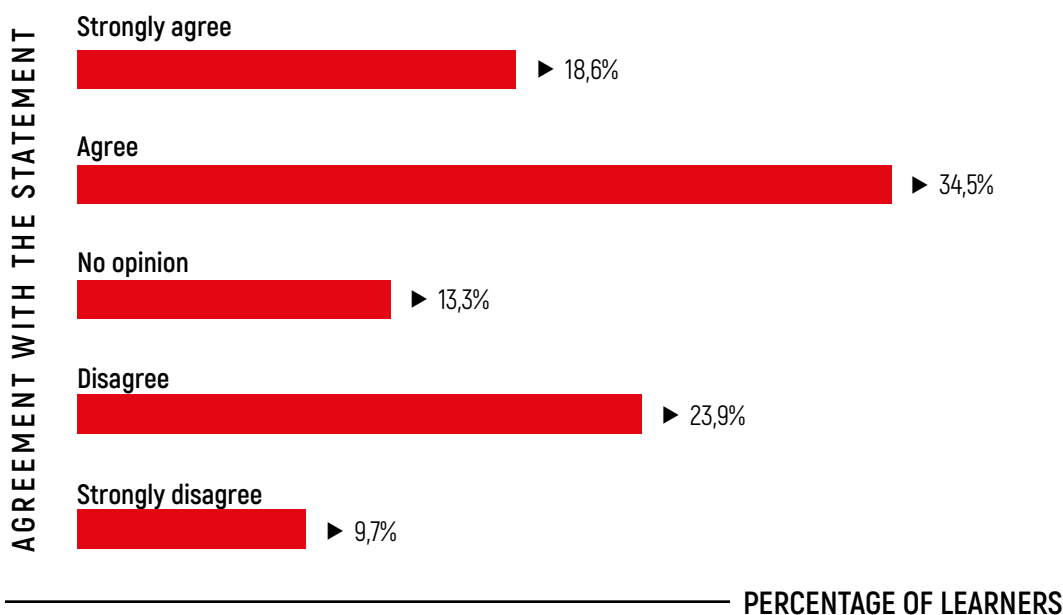
¹² Tracing secondary vocational and tertiary education graduates in the former Yugoslav Republic of Macedonia, pg.5, <https://www.etf.europa.eu/en/publications-and-resources/publications/tracing-secondary-vocational-and-tertiary-education>

analysed - six months after graduation, less than half (41%) of VET graduates were active in the labour market and a small proportion of them (21%) were employed.

This is also confirmed with the views of the learners regarding the employment opportunities after

the completed non-formal training. Namely, former learners that attended NFET share different opinions on *whether the knowledge and skills gained in training helped them for faster employment* (Graph 6).

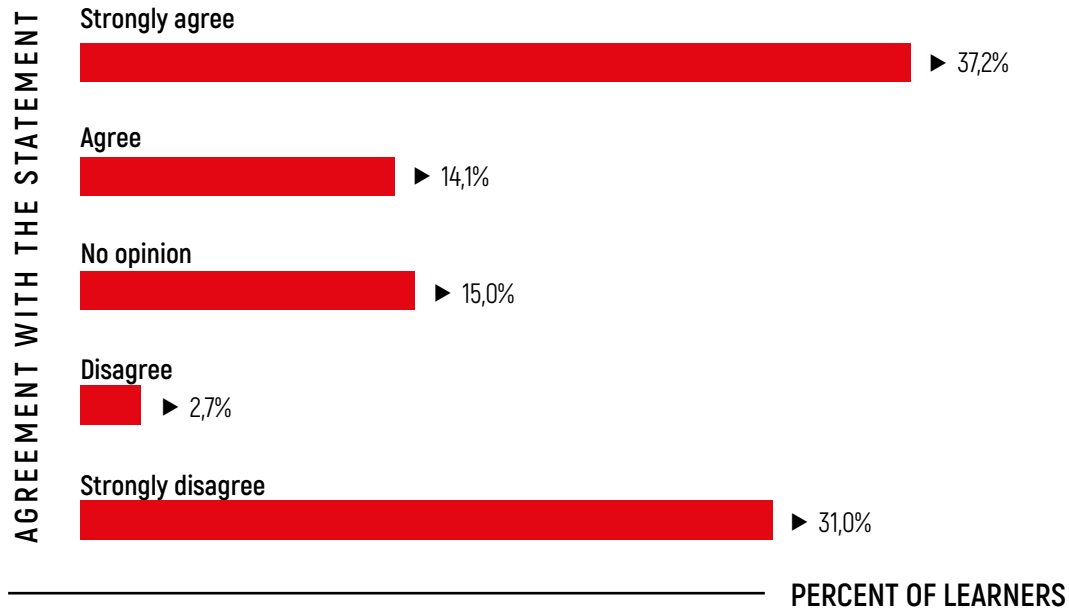
Graph 6: Views of learners on whether the knowledge and skills gained through the NFET programme helped them to find employment faster



With regard to the question *whether the knowledge and skills gained through the training helped them to get a workplace advancement*, the learners also share different opinions (Graph 7). Almost 1/3 of the respondents stated that the training did not helped them at all, and a little over 1/3 stated

that the training helped them to get a workplace advancement. It can be assumed that this is related to whether the attendance at the training was a personal decision or the person have been on the training by the recommendation of the employer.

Graph 7: Views of learners on whether the knowledge and skills gained through the NFET programme helped them to advance in the workplace



The learners are of opinion that they *need additional skills to gain either employment or workplace advancement*. In this regard, 71,4% of the respondents consider that they need to upgrade their competences and only 18,7% think they have enough competences to respond to the job position. These responses differ with the statement of the largest percentage of NFET providers according to whom their offer is labor market-oriented.

More than two thirds of the respondents from secondary vocational schools agree that for students to gain variety of contemporary skills, the curricula need to be adjusted according to the current trends of the relevant vocation/profile.

3.2. Inclusiveness of the non-formal education and training programmes

Inclusiveness of NFET programmes is one of the preconditions for creating modern education and training system with no discrimination regardless of gender, race, ethnic, religious, or other background, where persons from vulnerable categories as well as persons with disabilities/difficulties will be able to reach their potential and become active participants on the labor market, and thus contribute to their personal development and the development of the society.

With regard to the inclusiveness of the NFET programmes, each of the instruments had a set of questions. When analyzing the answers, an aggregated index was made from the corresponding questions (items), and additional calculation of the percentage of the respondents (the answers in the category "I do not have an opinion" are re-coded).

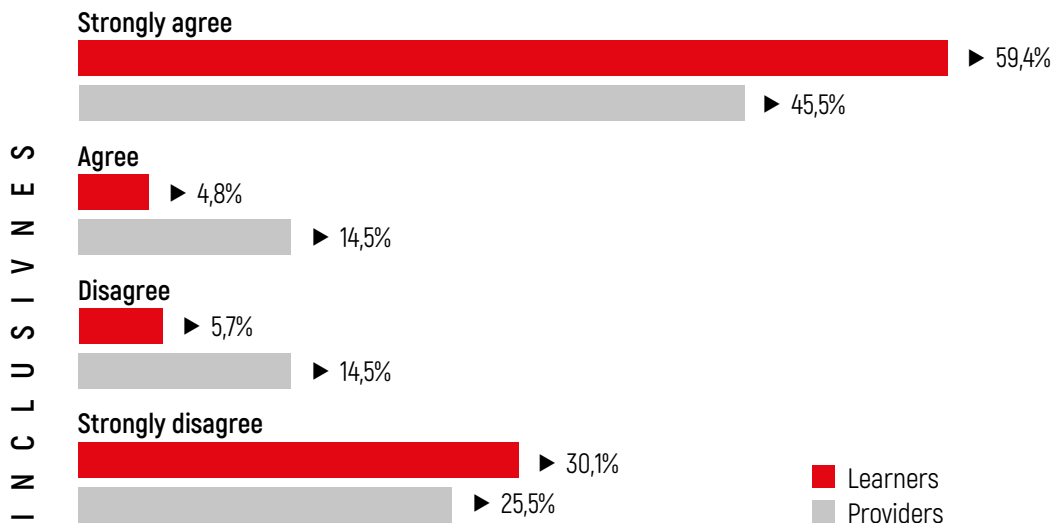
A more detailed description of the questions used for the Inclusiveness index is given in Table 9.

Table 9: Questions related to inclusiveness

Code	Sample	Description of the items in the instrument
AA	Nonformal education and training providers	<ul style="list-style-type: none"> ▶ Possibility for adjustment of the NFET programme for persons with disabilities/difficulties ▶ Availability of the program in several languages (Macedonian, Albanian, etc.) ▶ Gender, religious and ethnic background of the trainers
AB	Secondary vocational schools	<ul style="list-style-type: none"> ▶ Opportunities for access and participation for persons with disabilities/difficulties and the conditions thereto ▶ Availability of curricula in several languages (Macedonian, Albanian, Turkish, etc.) ▶ Gender structure, religious and ethnic background of teachers
AC	Learners	<ul style="list-style-type: none"> ▶ Discrimination during training ▶ Persons with disabilities/difficulties in their group ▶ Implementation of the training in the native language of the participants ▶ Gender, religious and ethnic background of the trainers
AD	Municipalities	<ul style="list-style-type: none"> ▶ Availability of curricula in several languages (Macedonian, Albanian, Turkish, etc.) ▶ Programmes accessibility regardless of gender, race, nationality, ethnicity, and health status.

Based on the index it is concluded that (Graph 8):

Graph 8. Providers and learner's assessment of NFET programmes in terms of inclusiveness



RESPONDENTS

- ▶ 44.5% of the NFET providers strongly agree that the NFET offer is inclusive; and
- ▶ 59.4% of the learners strongly agree that the training they have completed is inclusive.
- ▶ It can be concluded that there is a statistically significant difference in the responses (specifically in category "strongly agree"), related to the inclusiveness. The NFET providers are more critical than the learners (perhaps because of a better understanding of the inclusiveness by the providers).

Further in this Report in more details are presented the findings from the survey regarding the inclusiveness of the NFET offer.

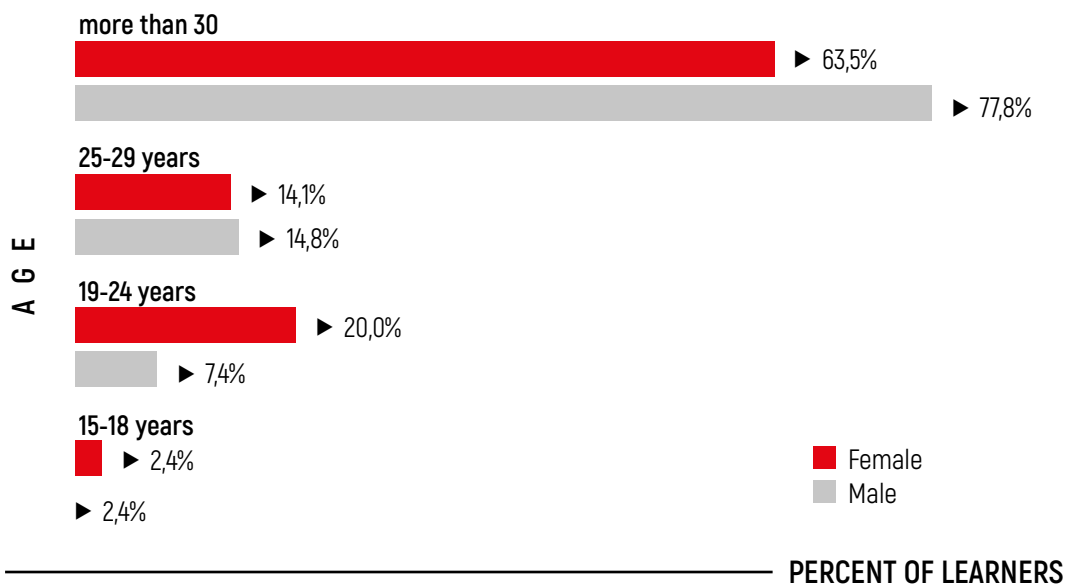
Age of learners

Around two-thirds of both male and female learners are over 30 years old. This means that this is the age category that has the greatest need for improvement of their competences or gaining new ones. The fact that 2.4% of female persons

that attended non-formal education and training are aged 15-18 years is concerning, because these are persons that according to the law should be in the formal system of secondary education.

The following Graph provides an overview of the age structure of the learners included in the survey:

Graph 9: Age structure of learners by gender



Ethnicity of the learners

The data on the distribution, by ethnicity, for the beneficiaries of non-formal adult education pro-

grams that answered the questionnaire, are given in Table 10.

Table 10: Percentage of learners by ethnicity and gender

	Macedonian	Albanian	Roma	Serbian	Other	Total
Male	74,1%	14,8 %	11,1 %	0,0 %	0,0 %	100%
Female	60,0%	33,0 %	3,5 %	2,4 %	1,2 %	100%

according to ethnicity, the sample of beneficiaries of services from the NFET in the research for the project sectors and regions is mostly represent-

ed by Macedonians with 67%, Albanians with 23.9%, Roma with 7.3% and Serbs with 2.4%.

It should be emphasized that given the high unemployment rate among the Roma, which according to the estimation by the Council of Europe is 70%¹³, their representation in the training for the NFET is very small (female especially). The low level of education, as well as the inadequate qualifications for the placement on the labor market, certainly more cause the social exclusion of this marginalized group.

The low involvement in the NFET can be due to various reasons: lack of finance (because many programs require self-financing by the participants), insufficient information, lack of offer of programs in the Roma language, etc.

Educational level of learners

Regarding the educational level, the learners were asked what is *the highest level of education they have completed before the training*. According to their answers, the largest percentage of them have completed secondary education (77%), whereas the percentage of learners who have completed higher education (14.2%) and primary education (8.9%) is lower. There are no learners without basic education, as the precondition for admission in any NFET programme is primary education.

These data, referring to the NFET training in 2017 and 2018 and for the four regions and seven sectors of the Project, are in line with the data from the Adult education survey in 2016 (Chapter 1 of this Report).

Accessibility of the programmes for different groups of people

According to the answers of the respondents - providers of services for the NFET, almost all (90%) consider *the programs they offer to be available for all categories of citizens regardless of their religious, national, ethnic, racial and gender background, as well as the health status*. Training providers also (nearly 80%) agree that the programs they offer are available and / or easily adaptable to persons with disabilities.

These views are supported by the opinion of the users/learners of the NFET. Almost 85% of them reported that during the training they *did not feel any discrimination* regardless their religion, nationality, ethnicity, gender, etc.

A certain percentage of learners (18.8%) stated that *there were persons with disabilities who participated in the training*. This is encouraging information in terms of reducing the prejudices so that these persons can enter the labor market. It is also important to note that the NFET providers in focus groups stated that are willing to make changes and adjustments in the programmes according to the specific needs of these persons, as well as to provide an appropriate trainer who would guide them during the training and ensure their progress.

Compared with NFET providers answers, most respondents from the SVS stated that there are generally no conditions for teaching students with disabilities. This is disappointing given that the concept of inclusion has been stipulated in the laws for formal and compulsory education already for decades and indicates that the government only put efforts on paper.

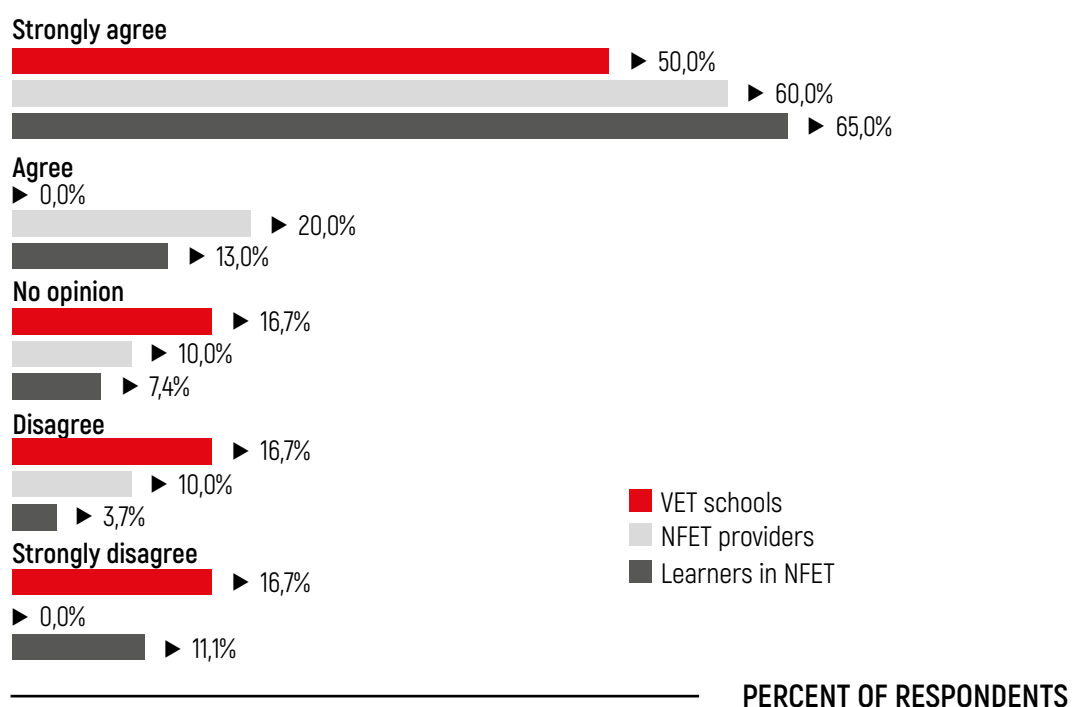
Regarding the staff involved in the implementation of the NFET programs and in the implementation of the curricula in the VET schools, it can be concluded that the principle of inclusion is re-

¹³ Council of Europe, CAHROM, Thematic Report by the Group of Experts on Vocational Education and Training for Roma. September 2016
<https://rm.coe.int/CoERMPublicCommonSearchServices/DisplayDCTMContent?documentId=09000016806a9332>

spected in terms of gender, as well as the ethnic and religious determination of the teaching staff. The similarity of the perception of all categories of respondents in the survey is visible on the Graph 10.

According to the representatives of NFET providers who participated in the focus groups, the programmes are offered in several languages, and if necessary, trainers or translators are provided according to the participants needs.

Graph 10: The balance of the teaching / training staff in terms of gender, ethnicity and religious affiliation



Interest for non-formal education and training programmes by different groups

Regarding the interest for the specific training by the learners from different ethnic groups, there is a difference in the preferences between Macedonians, Albanians and Roma when it comes to

the economic sector. The Graph 11 shows the answers according to learners nationality and their interest for different vocations/profiles.

Graph 11: Economic sectors attended by learners from different ethnic groups

Food processing and technology

- ▶ 0,0%
- ▶ 0,0%
- ▶ 4,2%

Health and social care

- ▶ 83,3%
- ▶ 0,0%
- ▶ 56,3%

Hospitality and tourism

- ▶ 0,0%
- ▶ 3,7%
- ▶ 4,2%

Personal services

- ▶ 6,7%
- ▶ 89,0%
- ▶ 27,1%

Machinery

- ▶ 10,0%
- ▶ 7,4%
- ▶ 8,3%

- Roma
- Albanian
- Macedonian

PERCENT OF LEARNERS

It can be noted that learners of Macedonian nationality are mostly interested in trainings for Health and Social care sector, as well as for the Personal services sector. Almost 90% of ethnic Albanians are interested in trainings in the Personal services sector.

The answer from female Roma shows that they are interested in trainings in the Health and social care sector and Personal services sector, while male Roma besides these two sectors are also interested in trainings in the Machinery.

3.3. Implementation of the non-formal education and training programmes

The quality of the implementation of NFET programmes is one of the basic prerequisites in order for the learners to acquire adequate competences from the relevant vocation/profile, and contributes to their successful placement on the labor market. The quality of the design of the NFET programme itself and its implementation affects the attractiveness of the offered trainings, as well as the financial structure of the training.

In this research we assessed the quality of the implementation of the programmes, through assessment of: the use of modern and interactive teaching methods and techniques, the competences of the trainers/teachers from the relevant vocation/profile, and the use of modern tools, machinery, materials, equipment, etc. in accordance with the needs of the workplace.

Teaching methods and techniques

Representatives of secondary vocational schools refrain from evaluating the use of modern and interactive teaching methods and teaching techniques in curricula. Half of them said they did not have an opinion, and 16.7% said they did not use modern teaching methods. This points to the fact that secondary education teachers need support for acquiring and upgrading their competences for applying modern teaching, as well as technical skills for appropriate vocation / profile.

The surveyed learners in NFET agreed that *the trainers possessed up-to-date knowledge and skills for the relevant vocation/profile* which confirms that appropriate trainers are being engaged in the trainings.

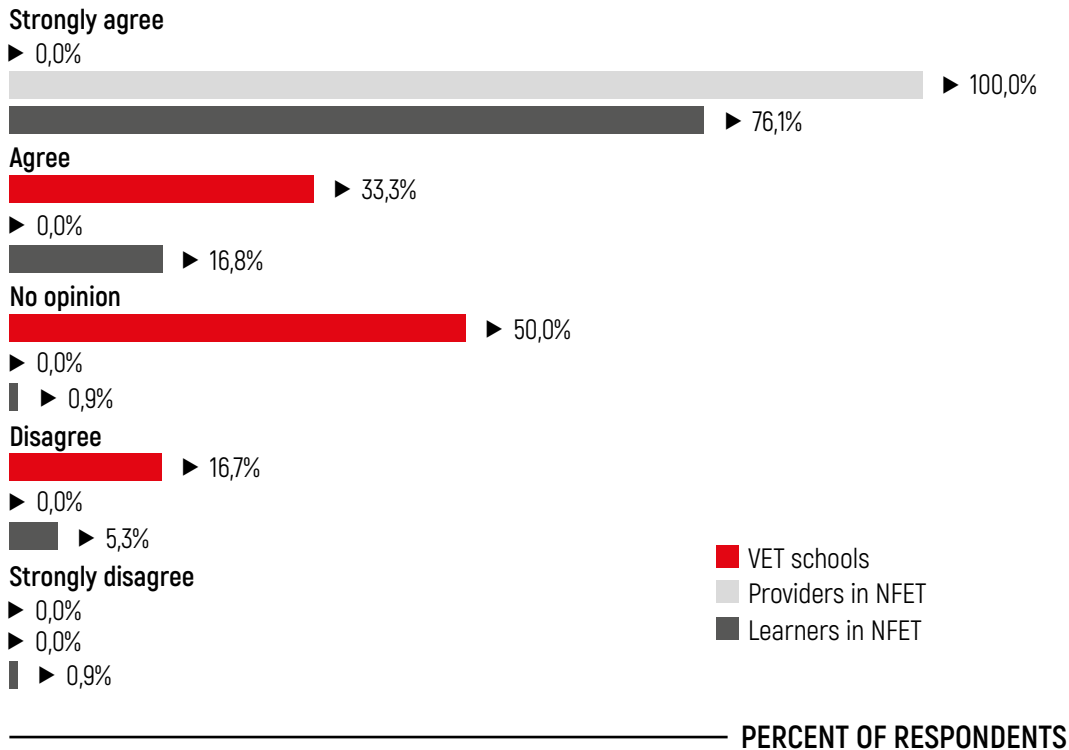
In the focus groups, the NFET providers stated that they have difficulties in finding trainers for certain occupations (such as a locksmith or welder), and that it is difficult to harmonize the

schedule for the realization of the trainings with the professional engagement of the trainer. The NFET providers agreed that the engaged trainers *use modern and interactive teaching methods and techniques*.

The Graph 12 presents the views on teaching methods and techniques from all three groups of respondents.

The reasons for the big differences in the answers to this question among the respondents from formal education and from non-formal education may be the traditional implementation of the curricula in the secondary VET schools, as well as lack of criticality in answering questions by the training NFET providers.

Graph 12: Views of respondents on use of the modern and interactive teaching methods and techniques in the trainings



Use of tools, devices, materials, equipment, etc. during training

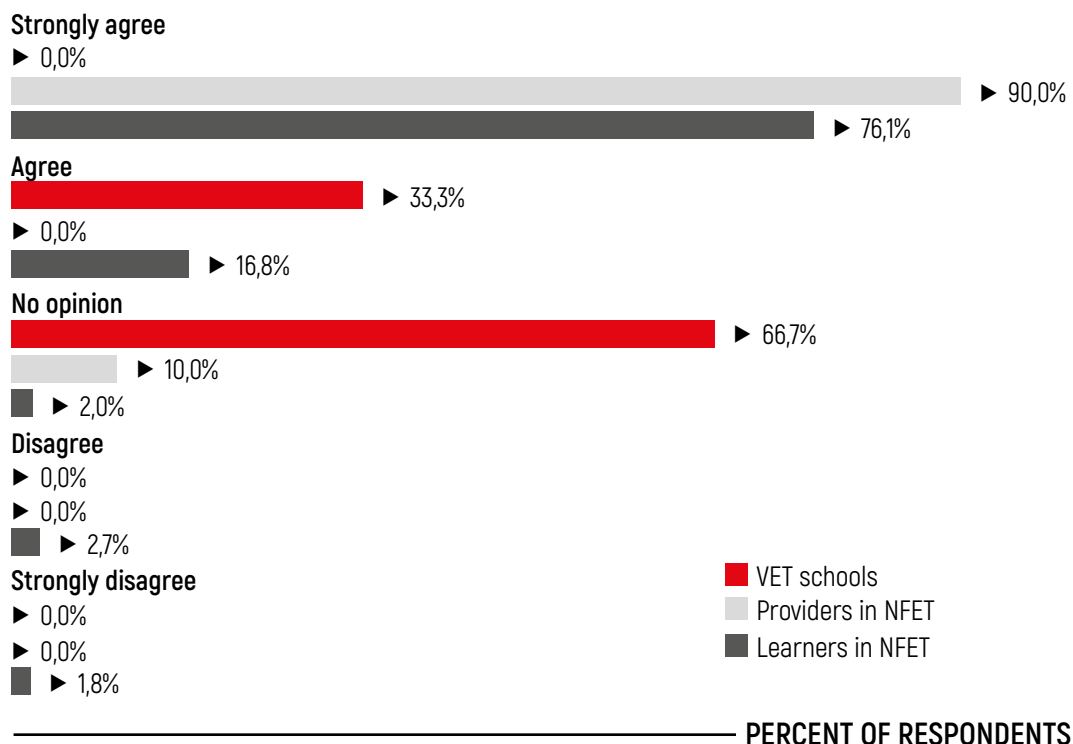
All representatives from the NFET providers have stated that they use tools, machines, materials, etc. in accordance with the needs of the jobs. From the Graph 13 we can conclude that the opinions of the providers and participants in the trainings are almost identical, while the views of the representatives of the secondary vocational schools differ significantly.

The reasons for this discrepancy can be seen in the fact that most of the NFET providers are private companies that provide the necessary materials, tools, etc. for the training. On the other side,

the VET schools are public institutions that do not have enough recourses and additional funds for such purposes.

However, some of the NFET providers sometimes have difficulties to provide the adequate equipment and materials for certain specific occupations partly due to their financial fragility, as well as due to the low fees they charge for the trainings.

Graph 13: Views of respondents on the use of modern tools, devices, materials, equipment, etc. according to the needs of the workplace.



3.4. Cooperation within the social environment

The development of accessible, modern and inclusive programs for informal adult education and formal vocational education and training, among other depend on the established cooperation of the providers of these services with the local and wider social community. Within the framework of

this research, the respondents from three categories: providers offering NFET, secondary vocational schools and local self-government, were asked about the level of their cooperation with the employers, with the for Adult Education Centre and with the Employment Agency.

Cooperation with the employers

From the responses to the *questionnaires*, it can be concluded that the providers of non-formal adult education have built a certain cooperation with the business sector, higher education, and with the state institutions that offer support in the creation and realization of programs for informal adult education.

Namely, 80% of the providers for the NFET claim that they have established cooperation with the business sector. But these answers to the questionnaire are not confirmed by the data obtained from the focus groups. The representatives from the providers, declare that there is no good cooperation with either the local self-government or the employers, especially regarding:

- ▶ a precise analysis of which training and qualifications are needed; and
- ▶ the opportunity to realize the practical part of the training for acquiring skills in companies.

Respondents from secondary vocational schools declare that there is cooperation with employers. About two thirds of these respondents reported that they cooperate with the business sector for the realization of practical classes and that the majority of students practice practical training in local companies.

Cooperation with the institutions

In the NFET system, the cooperation with the Adult Education Center, as well as with the Employment Agency, is important. In this regard, the respondents from all categories: providers of NFOS, municipalities and vocational schools have a generally positive attitude. This is confirmed by the answers to the questionnaires, as well as from the respondents in the focus groups.

The data show that:

- ▶ More than half of the respondents from the municipalities responded that they cooperate with the AEC for verification of non-formal education programs; and
- ▶ 70% of the providers stated that they cooperate with Agency for employment; but 10% do not cooperate at all, although for them, this institution should be one of the main sources of information on the labor market demand for specific profiles.

Information about the offer of the programs

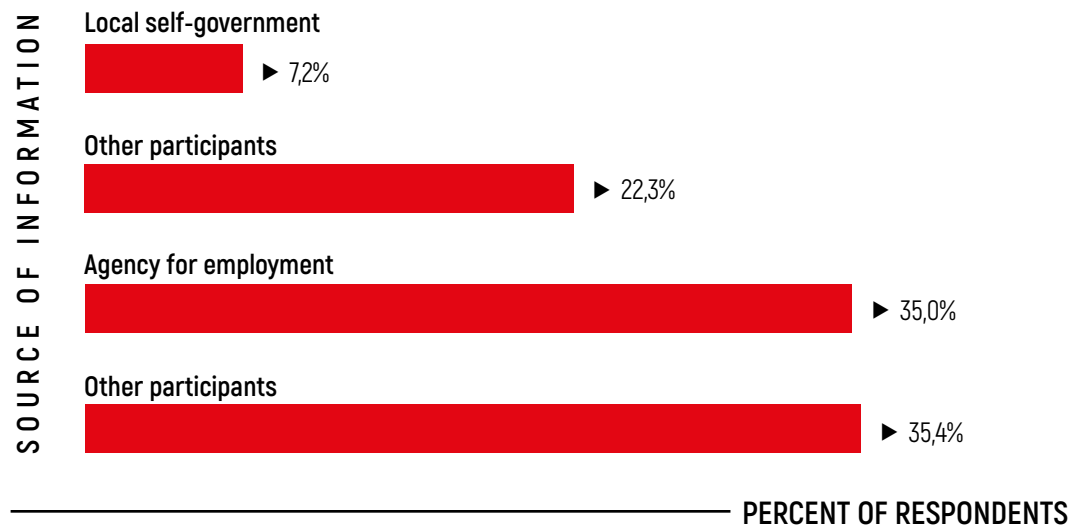
Taking into consideration that this research refers to the market-orientedness of the NFET programmes, it was necessary to assess whether the NFET providers themselves are market-oriented, i.e. to what extent and how do they inform their future potential users of their offer/learners.

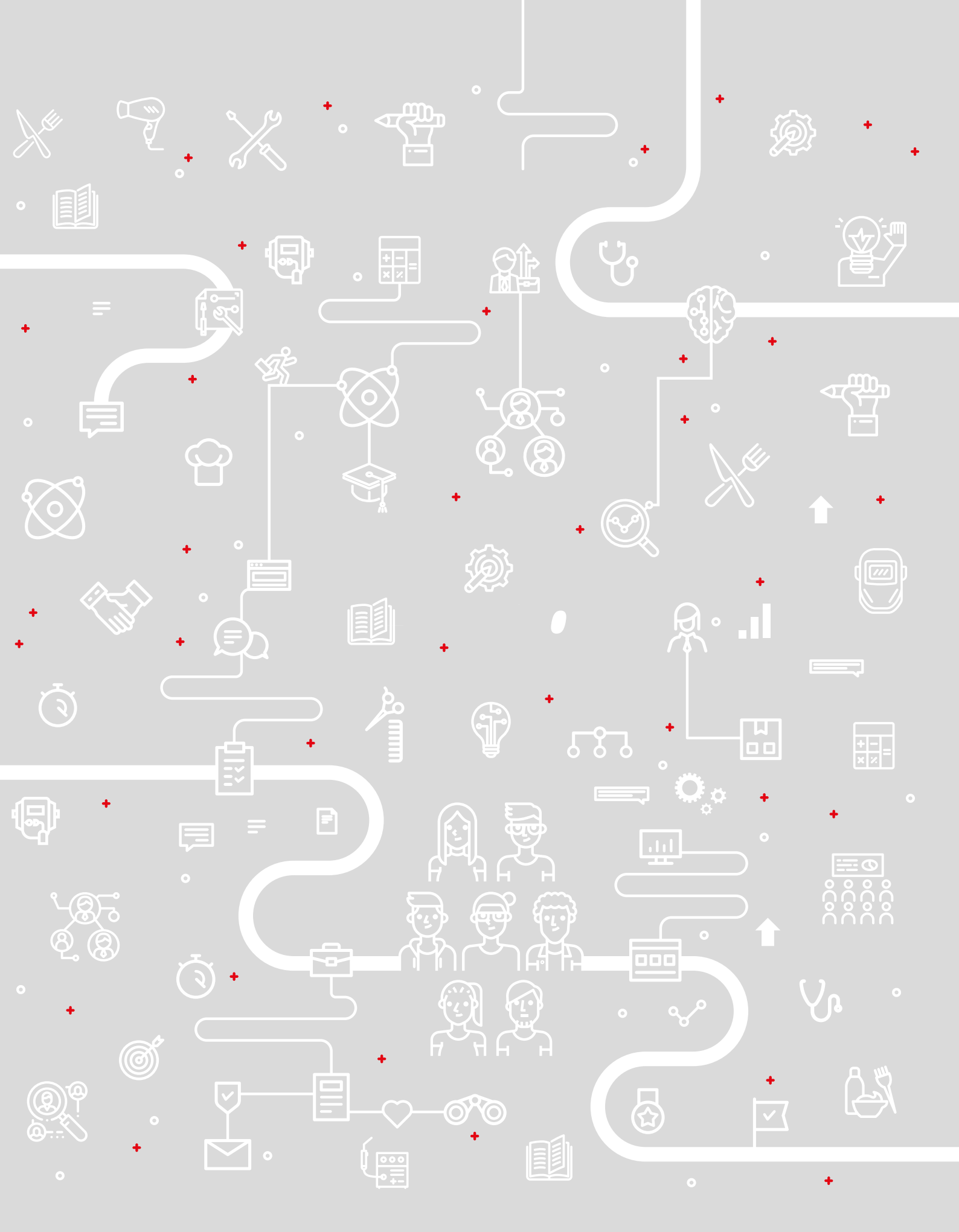
Therefore, we asked the learners how they find the information about the training they attended. Given the answers received we can conclude that they were mostly informed through the media (TV, radio, internet, advertisements), as well as information from Agency for employment. A smaller proportion of the respondents got informed through previous participants in the trainings, while the smallest proportion of the respondents got informed through the local self-government. This points to the outreach power of the media, as well as the institutional support by Agency as a pillar among the other institutions for guiding providers, providing training and employment opportunities.

But we can not underestimate the fact that almost 1/4 of the trainees were informed by previous participants of the training. This indicates that service providers in the NFAE should continuously work towards increasing the attractiveness and the quality of the trainings they offer.

The minimal participation of the local self-government is concerning, given that it should link the private sector needs and the supply of VET/ NFET institutions at local level.

Graph 14: Answers by the trainings participants on finding of the information about the programs





CONCLUSIONS AND RECOMMENDATIONS



One of the basic functions and benefits of VET and NFET is to improve the access of young people and adults to job opportunities, to enable them placement and progress on the labor market, but also to increase their potential. Developing these functions will contribute to reducing their exclusion from the world of work and society. Only through continuous adaptation to the changing needs of the modern labor market, with the introduction of innovations in the teaching and realization of the trainings, with the respect and full realization of the concept of inclusion in the context of life-long learning, young people and adults can help to reduce poverty and social differences and to support sustainable development processes.

It should be noted that in analyzing and interpreting the results, we noticed the giving of socially desirable answers that occurs almost in all social research, mainly because of the mentality of this

region, as well as the fear of expressing their sincere opinion (especially if that opinion does not agree with that what the respondents consider the researcher wants to hear). Because the survey includes respondents who offered or attended trainings for non-formal education in seven economic sectors and four planning regions in the Republic of North Macedonia, it is not desirable the conclusions to be generalized.

Regarding the **market-orientedness of the NFET programmes**, all categories of respondents, without exception, consider that the offered NFET programmes are mainly in line with the labor market demand. These views can be considered as quite subjective, since in the further analysis we found out that very small proportion of the respondents use additional analysis and research for deficient vocations/profiles and that they are faced with lack of strategic directions for development of

such vocations/profiles. Detailed analysis shows that learners face need for additional competences for employment or workplace advancement. This suggests that there is a need for curriculum adaptation to the contemporary trends of the relevant profession / profile in order to ensure an appropriate placement on the labor market, as well as to increase the attractiveness of the NFET programs.

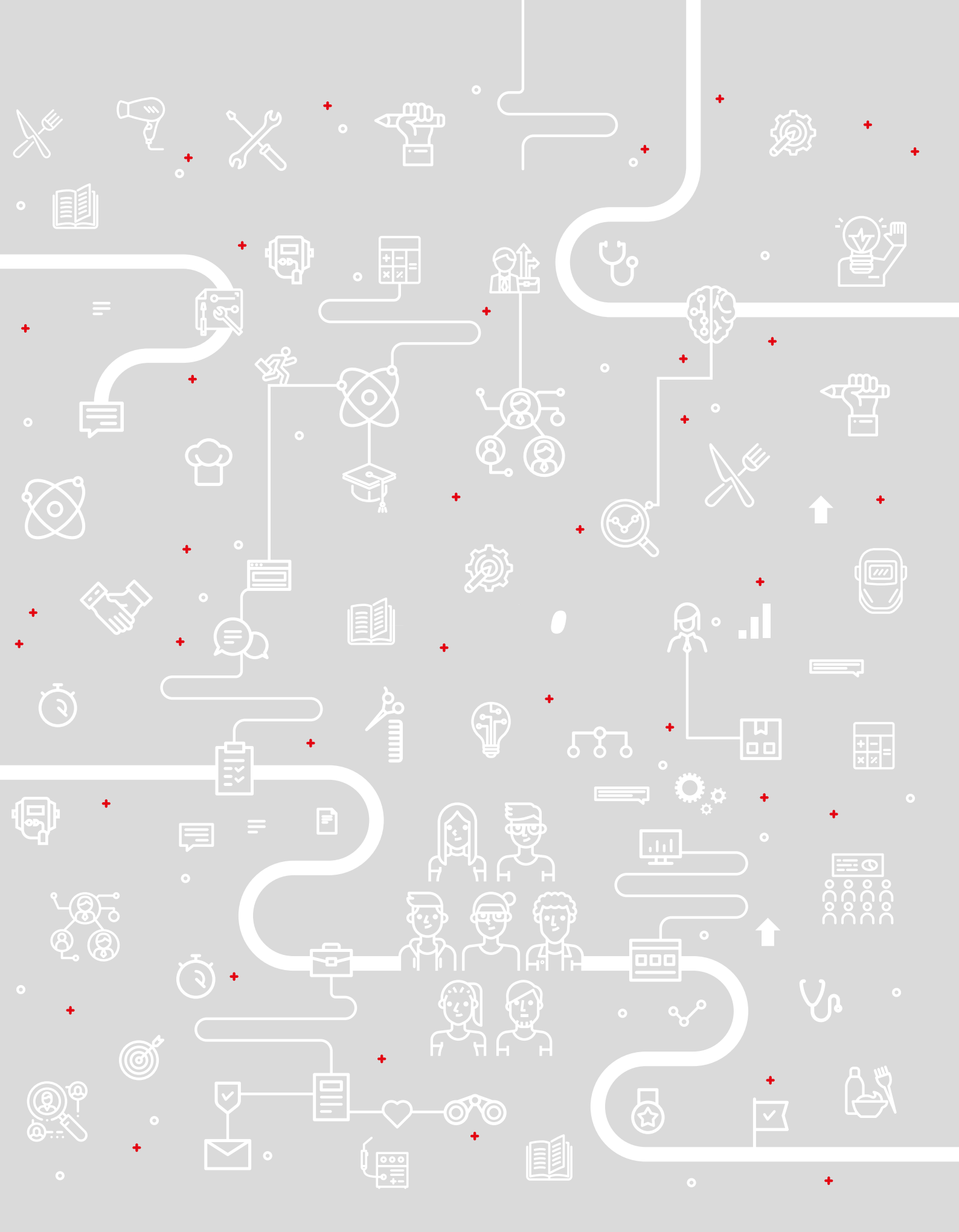
The concept of **inclusiveness of the NFET programmes** generally is respected, as it is one of the prerequisites for creating a modern VET/ NFET system with no room for discrimination regardless of gender, race, nationality ethnicity, religious affiliation etc., where the persons from vulnerable categories as well as the persons with disabilities could reach their potential and become active participants on the labor market. This is reflected in the affirmative views of the NFET providers who stated that they take into account the accessibility of the offer for all categories of citizens. These views are supported by the opinions of most of the learners who stated that *they have not felt discriminated on any grounds during the training*. It is also important to note that the NFET providers are willing to adapt the curricula for this category of citizens according to their needs, as well as to provide an appropriate trainer who would guide them during the training and ensure their progress. However, the data from the respondents from the VET schools point that there are no conditions for teaching of students with disabilities.

Regarding the trainers engaged for implementation of NFET programmes, as well as in the teaching process in the VET schools, it can be concluded that the principle of inclusion is respected in terms of gender, ethnicity and religious affiliation. Furthermore, the principle for implementation of the NFET programmes in the native language of the participants is respected.

Regarding the **quality of the implementation of the NFET programmes**, it can be concluded that the views of the respondents on the competences of the teaching staff for application of appropriate interactive methods and techniques differ. Namely, the trainers involved in implementation of NFET programmes are using modern teaching methods. In secondary schools there is a lack of modern tools, machines, materials, equipment, etc. in accordance with the needs of the workplace, which means that students are not able to acquire appropriate skills and competences. Likewise, the NFET providers are struggling to provide the adequate equipment and materials for certain vocations/profiles, as well as trainers with relevant and up-to-date teaching competences.

Regarding the **cooperation with the narrower and broader society**, it can be concluded that the NFET providers have established basic cooperation with the business sector, higher education institutions, as well as with state institutions that offer support in the design and implementation of NFET programmes. Also, there is weak cooperation with the local self-government and the private sector in terms of precise analysis what kind of trainings and qualifications are needed, as well as for practical training of the students in the companies.

Interviewed representatives from the NFET providers within the focus groups argued that they do not have appropriate cooperation with the local self-government and no support for the creation and realization of their programs. Regarding the cooperation with the Adult Education Center and the Employment Service Agency, the respondents expressed positive views which indicates that there is mutual trust between the public and the private sector for achievement of the educational goals.



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Vasil Gjorgov 16, 1000 Skopje
Republic of North Macedonia

