

## 'Bildungskarenz' A Programme of Educational Leave - Evaluation Problems and Strategies

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## Agenda

- Measure: 'Bildungskarenz [BK]'
- Evaluation methodology
- Results
- International and European perspective on educational leave
- Problems of evaluation

## The evaluation problems

- A very complex measure with very broad and poorly defined goals cannot be evaluated rigorously with the existing methods, or any methods?
- Complexity of measure:
  - The measure includes the policy makers and political authorities, the employees who take the leave, their employers, the education institutions, and the public employment service as implementing agency – each of them has his/her own interests and agenda
- Broad and poorly defined goals, ambiguous and partly conflicting with each other
  - Development of adult education (reducing time and financial constraints for participation)
  - Making participation more equitable (supporting employees with low access to education)
  - Contributing to employers demand for competencies
  - Demonstrating policy makers' ambition and willingness to deliver 'lifelong learning' policies

## The measure has changed during delivery: definition, parameters and changes

- Income support for employed persons on leave legally established
  - support was gradually increased from training subsidy (< 20 EUR/day, <600/month) to ue-compensation (2000 45+; 2008 all)
- for full-time continuing education which must be documented
  - by hours and programme, made gradually more rigorous (easy HE)
- within defined time period (maximum 1 year)
  - Minimal period gradually reduced from 6Mo to 3Mo (2000), to 2Mo 2008
- for stable employed people (required employment period with firm)
  - employment period 3y.until 2008, then 1y, 2009 6Mo.
- employer must agree, return after leave is aspired but not enforced
- marginal employment (~350EUR/month) possible in parallel
- after a defined period a new leave is possible
  - originally after 3y. then 4y.
- recently splitting into parts is possible
- administration and accounting by the public employment service
- financed from the unemployment insurance contributions

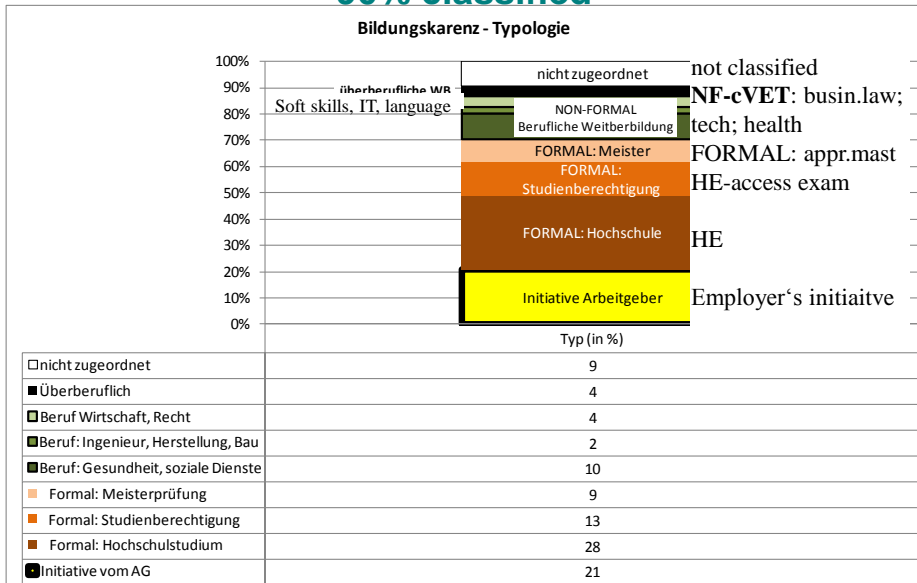
## ‘A measure on search for its goals‘

- Background: Long time desire for a more heavy support of adult education by employee organisations...
- ...has lead to the BK as measure for older people supporting the pension reform...
- ...has not worked, but BK has been taken up mainly by women to prolog their (alredy relative long) parental leave during first years...
- ...this has been skipped in 2000, then a ‚normal period‘ with very small take-up lasted until 2008, when changes in support and periods made it easier...
- ...during the crisis 2008/09 a strong increase took place, with employers using it as a kind of short-term work...
- ...and participation remained high afterwards

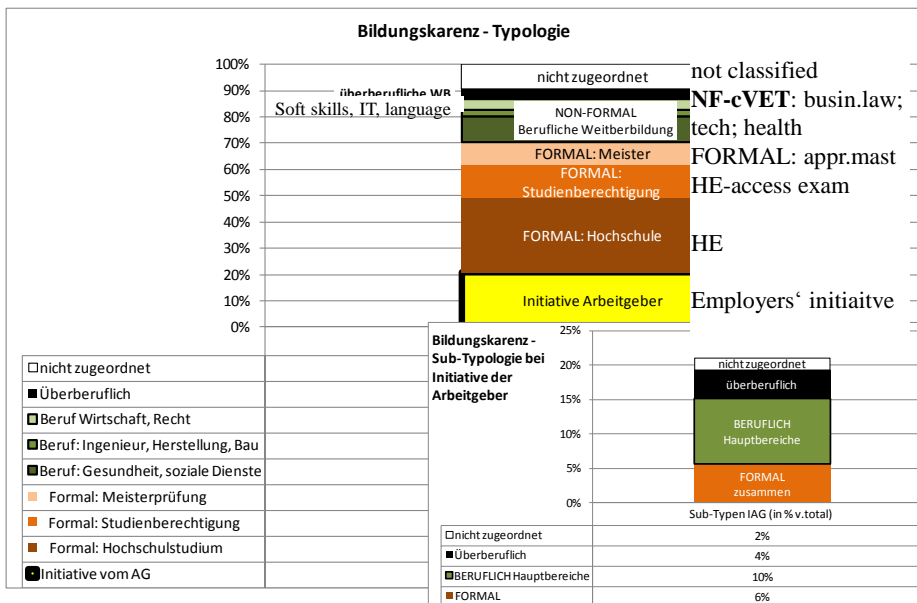
## Some basic structures of participation

- Uptake very small, ~1.500 persons, increase with ue-compensation and use by employers during crisis (~10.000)
- More women than men
- Women medium age (30-44), men younger (<30)
- Duration women ~1year, men 0,5years
- Trades before crisis health, education, public administration, then increase of manufacturing and retail
- Education about 40% non-formal continuing VET, 30% formal secondary, 30% formal higher education
- A mixture of specific purposes (typology)

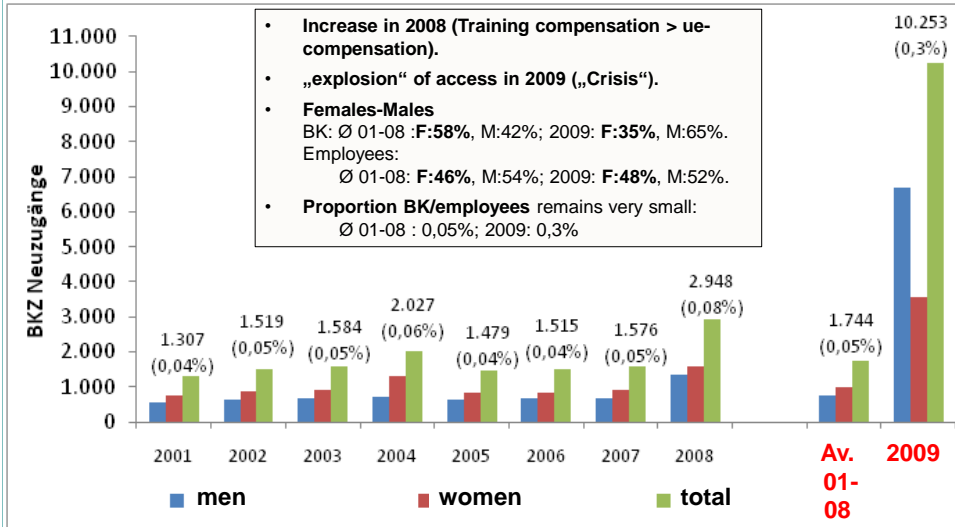
## Heterogenity: Typology of participation 90% classified



## Employers' initiative



## New entrants into BK 2001-08: increase with crisis 2009



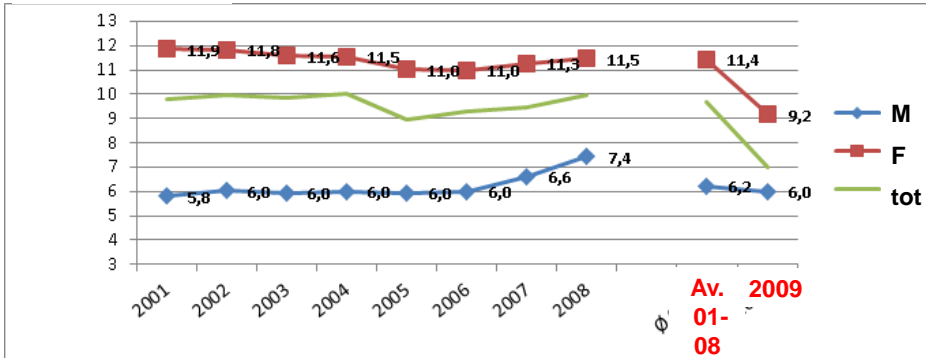
## New entrants by age, compared to employees



- **Men: mainly young <29y.** (2009: older groups +):  
Young: BK: Ø 00-08 :62%, 2009: 51%; Employees: Ø 00-08: 26%, 2009: 26%.
- **Women: mainly 30-44y.** (2009: younger groups+):  
medium BKZ: Ø 00-08 :57%, 2009: 49%; Employees: Ø 00-08: 45%, 2009: 40%.

## Duration of BK 2001-09

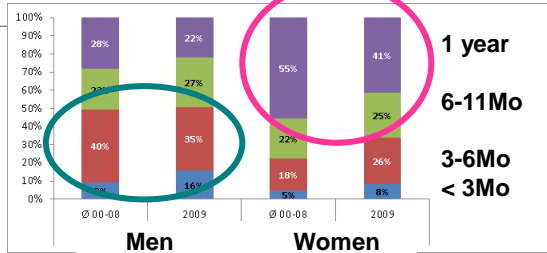
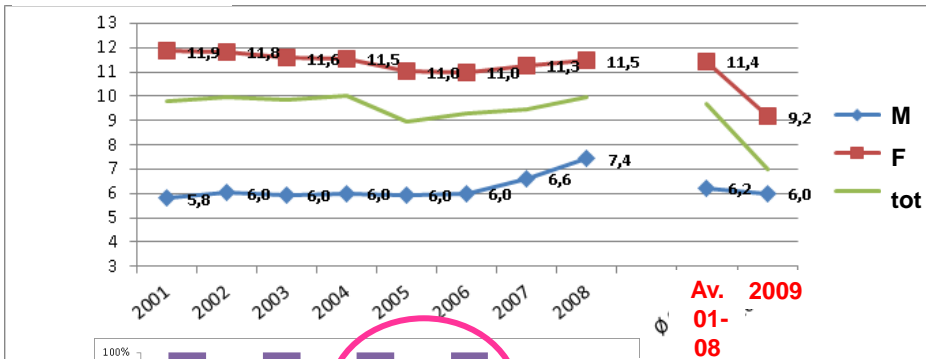
### Median Months



- Women: average almost 1 year, down to 9 Months 2009
- Men: average 0,5 years, no change in 2009

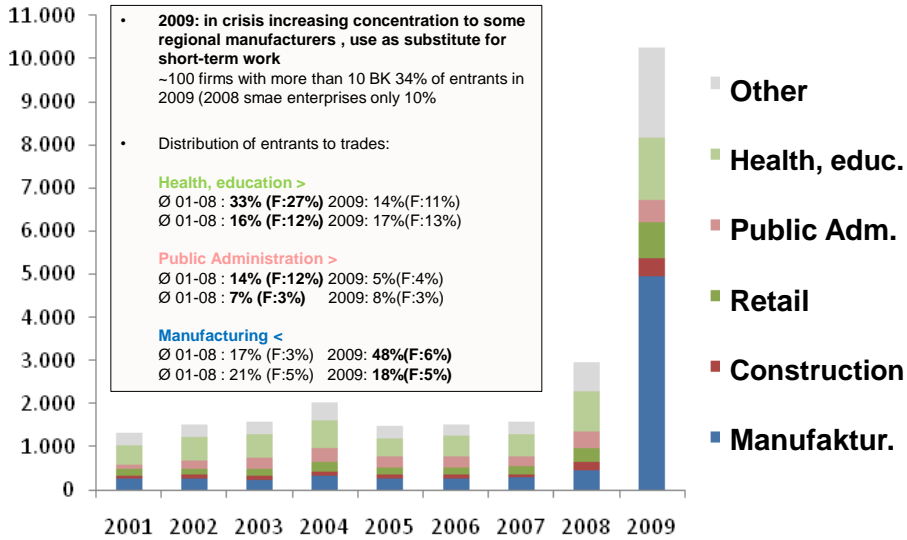
## Duration of BK 2001-09

### Median Months

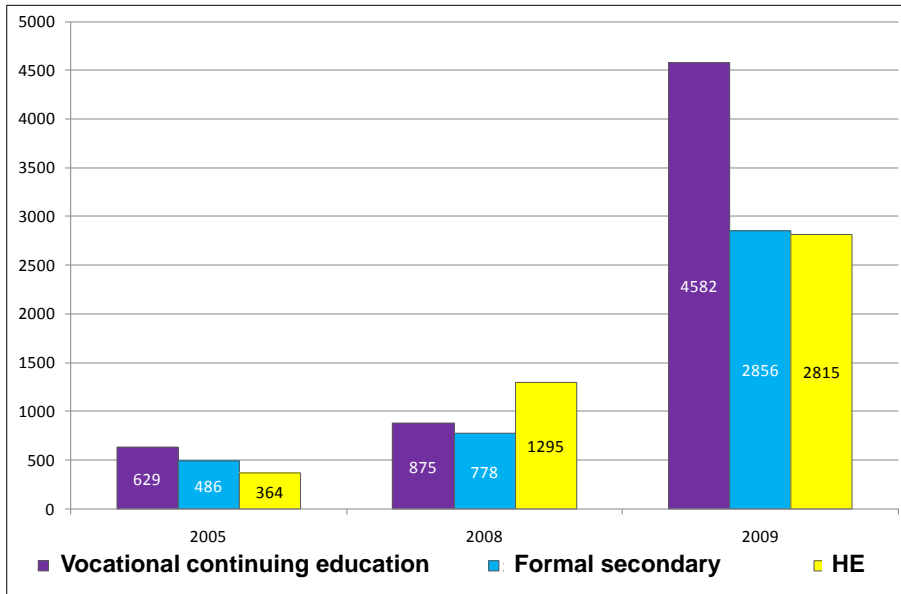


Categories  
Men: 3-6Mo  
Women: 1y

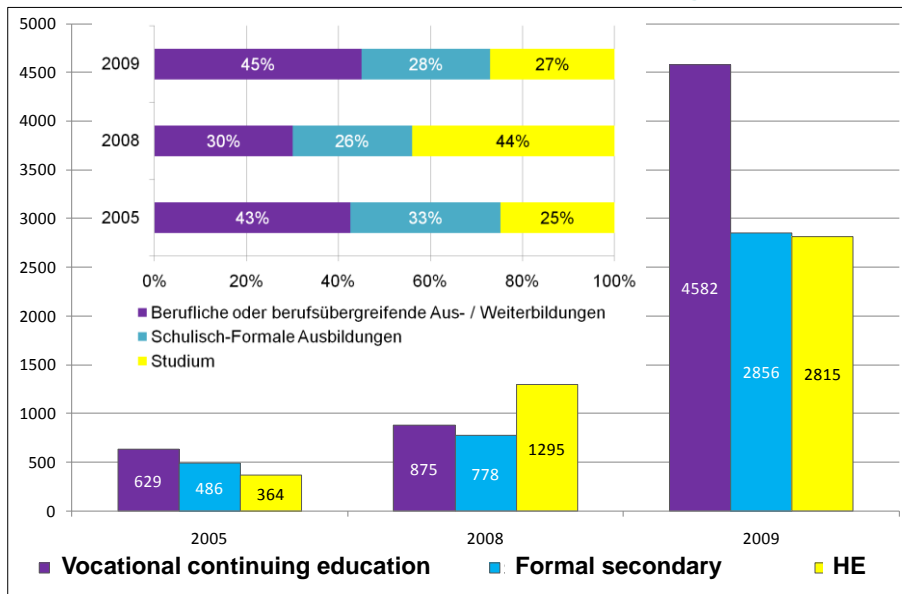
## New entrants by trades 2001-09: in crisis shift health&admin to manuf&retail



## Types of education (abs. & rel.): vocational / formal secondary / higher ed.



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## Methodology

- A big project, but not big enough for rigorous evaluation
- Because of financial constraints
  - Too small sample
  - No survey of non-participants
  - No observations about employers' practices
- Evaluation contract and methodology strongly guided by labour market policy questions and problems, however, BK is not labour market policy
  - Particular point: economic criteria (employment, income) as main criteria for success

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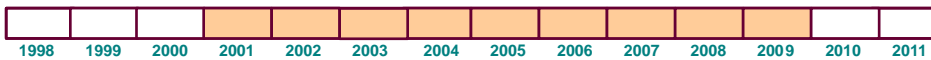


## Research questions, design overview, data time of delivery 1998-today

**„Bildungskarenz“**

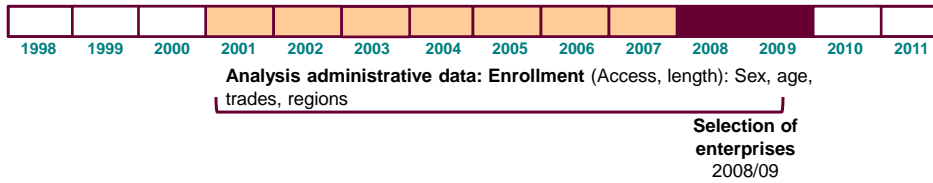


## Research questions, design overview, data adm.data; individual social security records

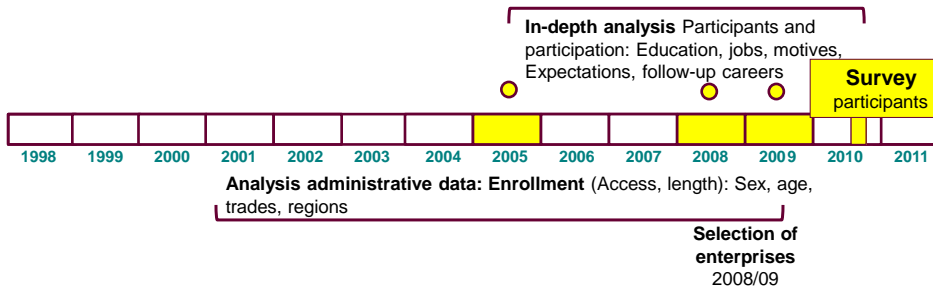


**Analysis administrative data: Enrollment** (Access, length): Sex, age,  
trades, regions

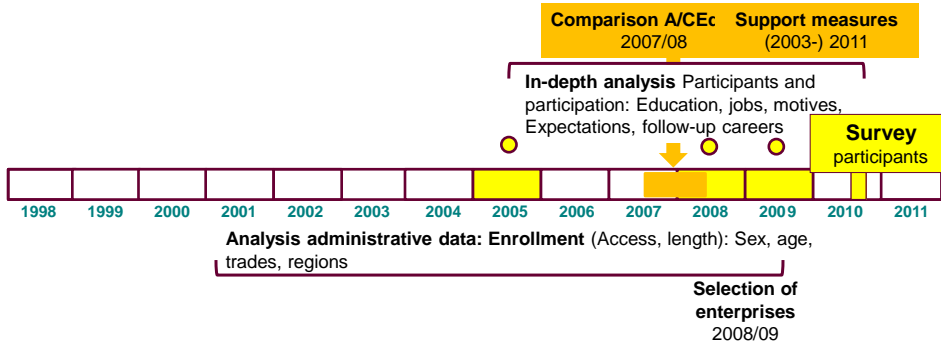
## Research questions, design overview, data selected enterprises 2008-09



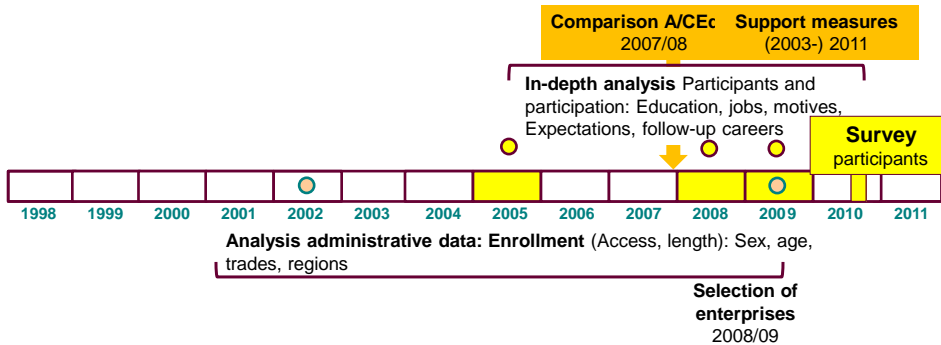
## Research questions, design overview, data participants survey in 2010, about 05, 08, 09



## Research questions, design overview, data comp.adult/continuing education, support

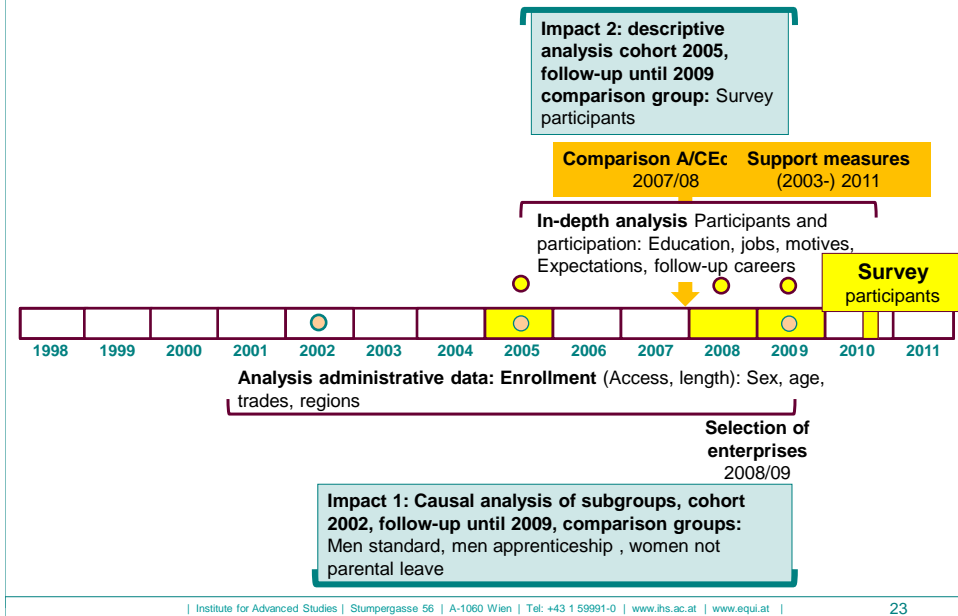


## Research questions, design overview, data causal impact analysis, cohort 2002-09 (7y.)

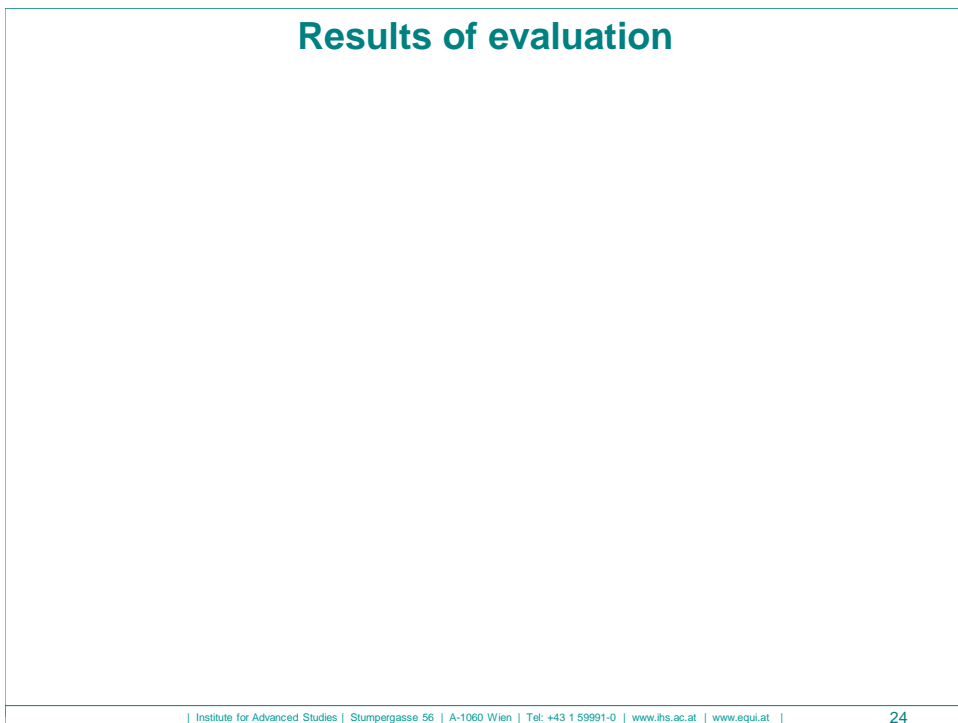


**Impact 1: Causal analysis of subgroups, cohort 2002, follow-up until 2009, comparison groups:**  
 Men standard, men apprenticeship, women not parental leave

## Research questions, design overview, data descriptive impact analysis, cohort 2005-09,4y.



## Results of evaluation



## Questions

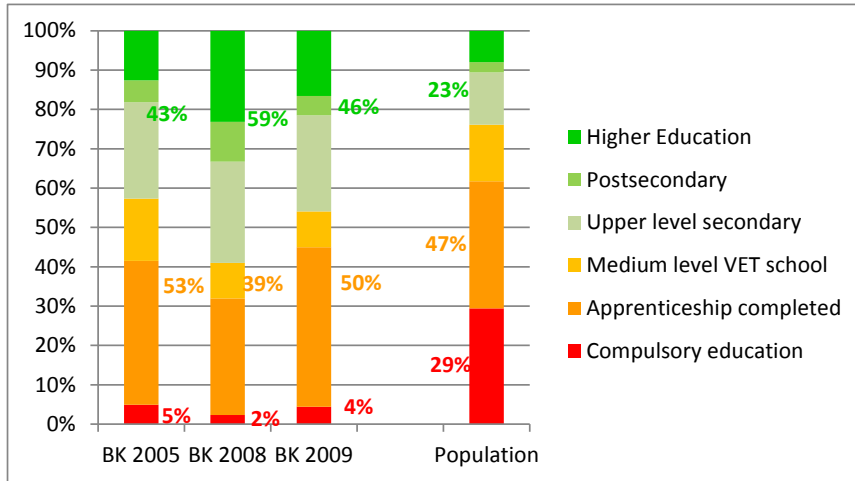
- Does BK have a compensatory function or does it rather increase the ‚Matthew-Effekt‘ (who already has, gets even more)?
- How does it fit into the adult education and support landscape? Does it increase opportunities? Which ones?
  - Is it used by employers for ‚human resource development [HRD]‘?
- What are the aspirations of participants?
- How do participants appreciate results?
- What are the economic impacts in terms of employment and income?

## Compensation or ‚Matthew‘?

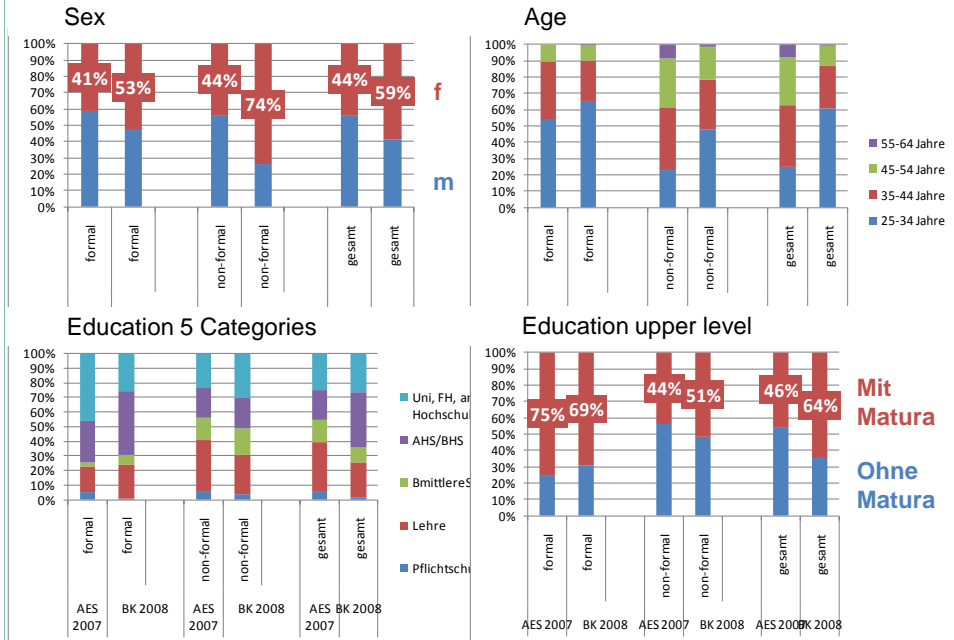
- Educational attainment BK and adult education participants (AES)
  - Comparison for above 25y. only
- Women more in BK, particularly non-formal education
- Age formal education similar, non-formal in BK more medium-young
- Education: more upper level in BK total; however...
  - ...in formal education more lower and medium level
  - ---in non-formal education more upper level
- Overall: ‚Matthew‘ with some slight compensatory elements
  - for women
  - at medium level education, particularly formal education (appr.master)
  - Low level clearly underrepresented

## Compensation or ‚Matthew‘?

- Educational attainment BK and population
  - Upper level 2x; medium level proportional; low level ~1:10



## AES & BK: Sex, age, education



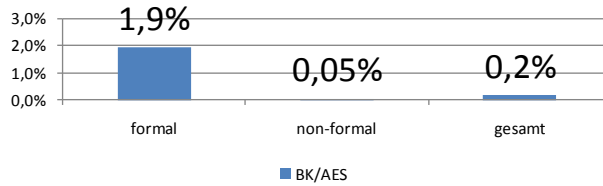
## Fit into adult education and support landscape

## Fit into adult education and support landscape

- Compared to total participation in AE: BK negligible
  - of total AE: 0,2%
  - of non formal AE: 0,05%
  - of formal AE: 1,9%
- BK has focus on formal AE
  - In total AE: 6% formal
  - In BK: Half (up to 72% among 25y+)
- More time for education in BK, as compared to total AE
  - Formal : + 50%
  - Non formal: 10 times
- some Groups more represented in BK
  - Women, younger (below 35y.), more educated  
*in particular unqualified people almost missing*
  - totally: BK-participants selected from a population with significantly increased probability for participation in AE
- Support landscape
  - chaotic intransparent structure, some similarities
  - participants take also other support, part. by regions

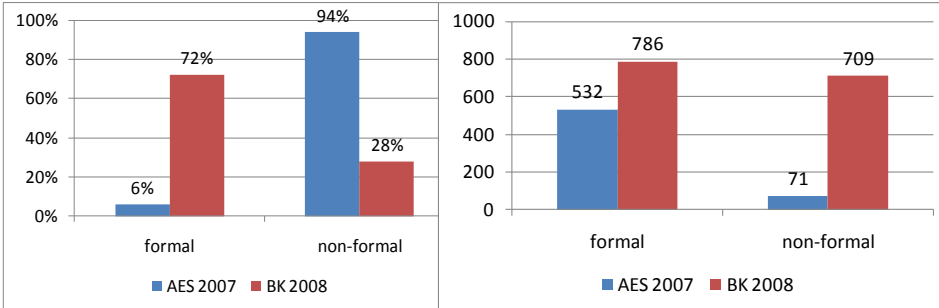
## Participation in AE (AES'07) & BK 2008 (25y+)

BK-participation as proportion of total AE



Distribution formal – non formal AES, BK

Hours AES, BK formal, non formal



## AE landscape by groups AES, CVTS, BK

Wenig WB			Mittel WB			Viel WB		
<b>Wirtschaftsbereiche, Branchen</b> AES+CVTS: Beherbergung/Gaststätten, <b>Bauwesen</b> , Land/Forstwirtschaft, Bergbau, [Sachgütererzeugung], Handel/Reparatur[Groß/Einzelhandel], persönliche Dienstleistungen			AES+CVTS: Verkehr/Nachrichten, [Realitäten], <b>Öffentliche Verwaltung</b>			AES+CVTS: Energie/Wasserversorgung, <b>Gesundheit/Sozialwesen</b> , Kredit/Versicherungswesen, Unterrichtswesen		
CVTS: Holz/Möbel/Spielwaren, Bekleidung/Schuhe, Nahrung/Genussmittel, [Realitäten]			CVTS: Chemie/Kunststoff/Glas, Metallherzeugung, Papier/Verlagswesen/Druck, Fahrzeugbau, Maschinenbau, [KFZ-Handel/Tankstellen]					
<b>Berufliche Tätigkeit</b> Land/Forstwirtschaftliche Berufe, Hilfskräfte, MaschinenanlagenbedienerInnen, Handwerksberufe,			Büroberufe, Dienstleistungsberufe			Technische Berufe, Führungskräfte, akademische Berufe		
<b>Bildungsstand</b> Pflichtschule, BMS			Lehre			Matura, Postsekundär, Hochschulen		
<b>Alter</b> 55-64J			25-34J, 45-54J			35-44J		
<b>Geschlecht</b>			Frauen, Männer					
<b>Bundesland</b> Burgenland, Kärnten, Niederösterreich, Salzburg, Wien			Steiermark, Tirol, Vorarlberg			Oberösterreich		
Wenig BKZ	Mittel BKZ	Viel BKZ	Wenig BKZ	Mittel BKZ	Viel BKZ	Wenig BKZ	Mittel BKZ	Viel BKZ
<b>Wirtschaftsbereiche, Branchen</b>			SONSTIGE			Öff. Verwaltung SONSTIGE		
Herstellung, Bau, Handel, SONSTIGE						Gesundh. Soziales		
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			POS. Selektion NEG. Selektion			POS. Selektion NEG. Selektion		



## AE landscape by groups AES, CVTS, BK

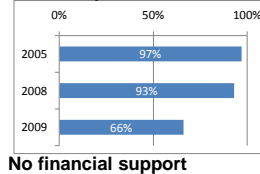
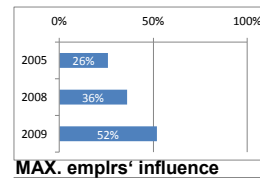
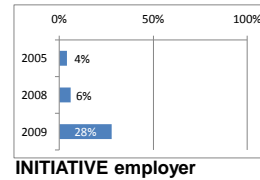
Weiterbildung in Erwerbstätigkeit									
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Bildungskarenz (BKZ)									
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<b>Wirtschaftsbereiche, Branchen</b> Herstellung, Bau, Handel, SONSTIGE			SONSTIGE			Öff. Verwaltung SONSTIGE			Gesundh. Soziales
<b>Berufliche Tätigkeit</b> Land/Forstw. Berufe, Hilfskräfte			Masch. Anlag. bedien., Handwerksberufe			Büroberufe, Dienstleistungsberufe			Führungskräfte, akademische B. Technische Berufe
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## Influence of employers on participation small but increasing

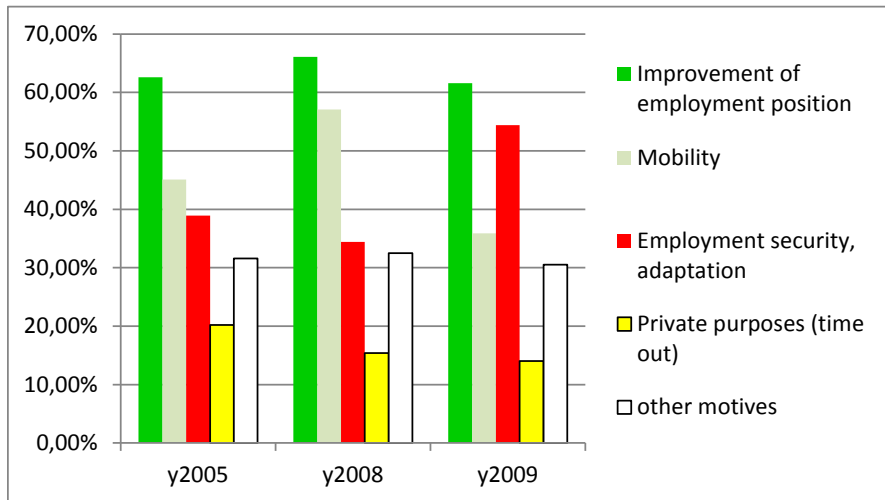
- Initiative mostly by participants, change 2009
  - 2005: **83% P**, 13% coll/friends, **4% employer**
  - 2008: **81% P**, 12% coll/friends, **6% employer**
  - 2009: **65% P**, 7% coll/friends, **28% employer** (10% 'pressure' by employer)
  
- Employers' influence on aspects of BK increasing (Programme, Duration, Supplier)
  - 2005: max.proportion employers' influence: **26%**
  - 2008: max.proportion employers' influence: **36%**
  - 2009: max.proportion employers' influence: **52%**
  
- Mostly no financial support by employer
  - 2005: no financial support employer: **97%**
  - 2008: no financial support employer: **93%**
  - 2009: no financial support employer: **66%**



## Changes according to survey Aspirations mostly fulfilled

- 80% of participants changes in employment or workplace
  - ¼ no change employment, workplace, employer
  - 4/5 no change of occupational field
- high mobility
  - 1/3 to 2/5 not in job before (changed, part selfemployed)
  - 10% change in firm or promotion
  - 12% unemployed, out of LF, or parental leave
- Much change in occupational tasks, mostly positive
  - Tasks more specialised, additional tasks, more responsibility
  - ½ working time changes, slight majority reduced from fulltime
  - more employees under supervision
- Household income 60% no change, ¼ plus, 1/6 minus
- Aspirations predominantly fulfilled
  - Mostly update of qualifications, private benefits, opportunities for promotion

## Aspirations of participants



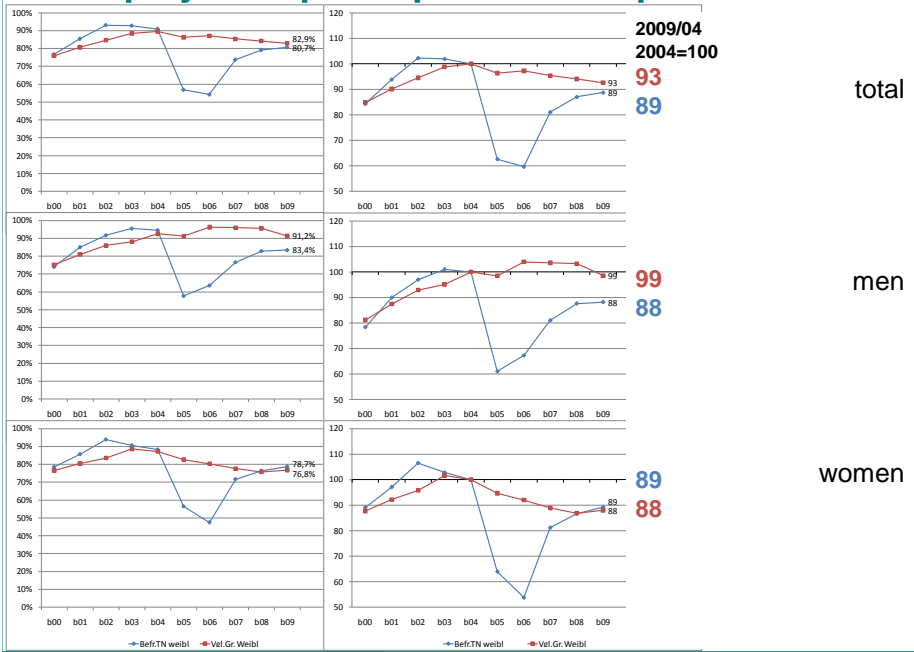
## Education completed during BK?

	Share (min-max p.year)	Education completed		Ø additional months needed
		yes	no	
Unspecific: Softskills	1 - 2,5%	100%	0%	–
Unspecific: IT	1 - 3%	94%	6%	8,5
Unspecific: Sprache	3 - 5%	92%	8%	3,1
Formal: apprenticeship master	10 - 13%	73%	27%	6,8
Formal: VET	0 - 2%	72%	28%	1,2
Non formal VET	25 - 36%	56%	44%	11,2
Formal: HE access	14 - 19%	51%	49%	11,4
Formal: HE	25 - 44%	16%	84%	19,2
<b>Total</b>	<b>100%</b>	<b>48%</b>	<b>52%</b>	<b>14,4</b>

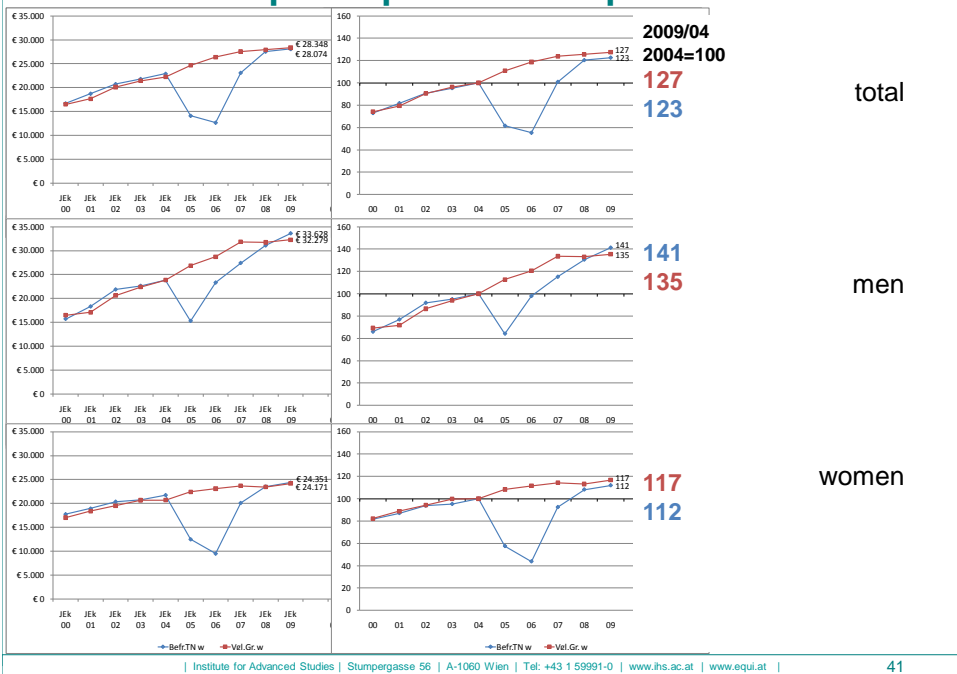
## Impact analysis

- Economic losses in terms of employment and income

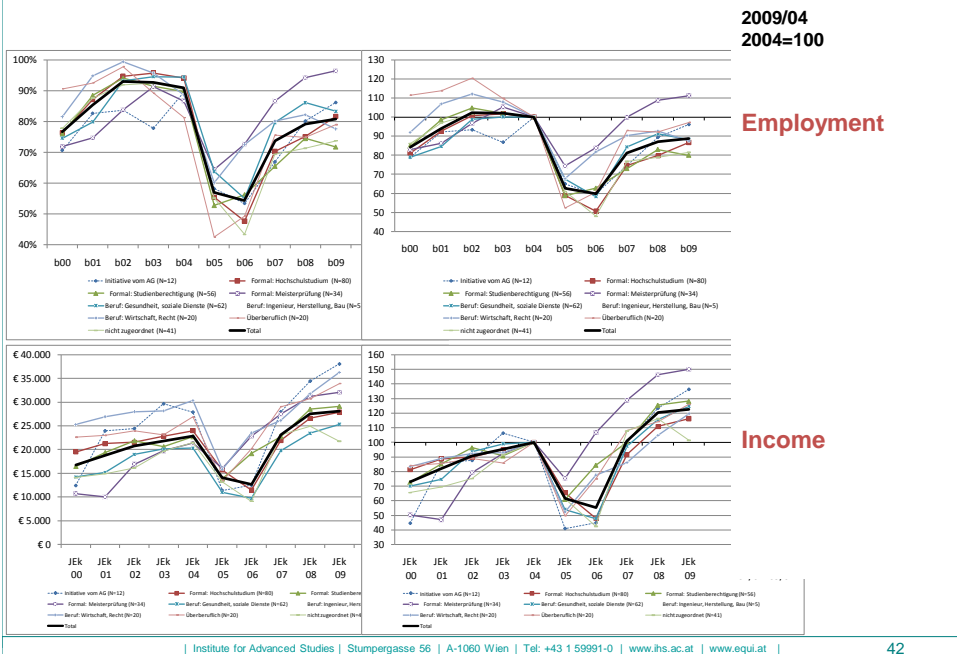
## Employment participants & comparisons 00-09



## Y.income participants & comparisons 00-09



## Typology: employment and income

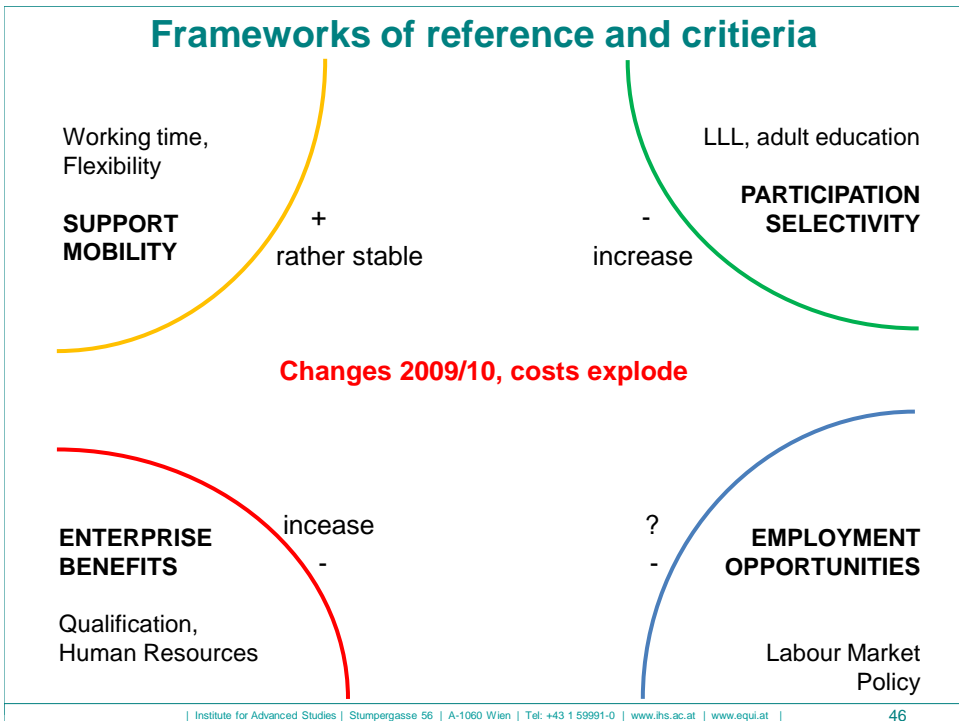
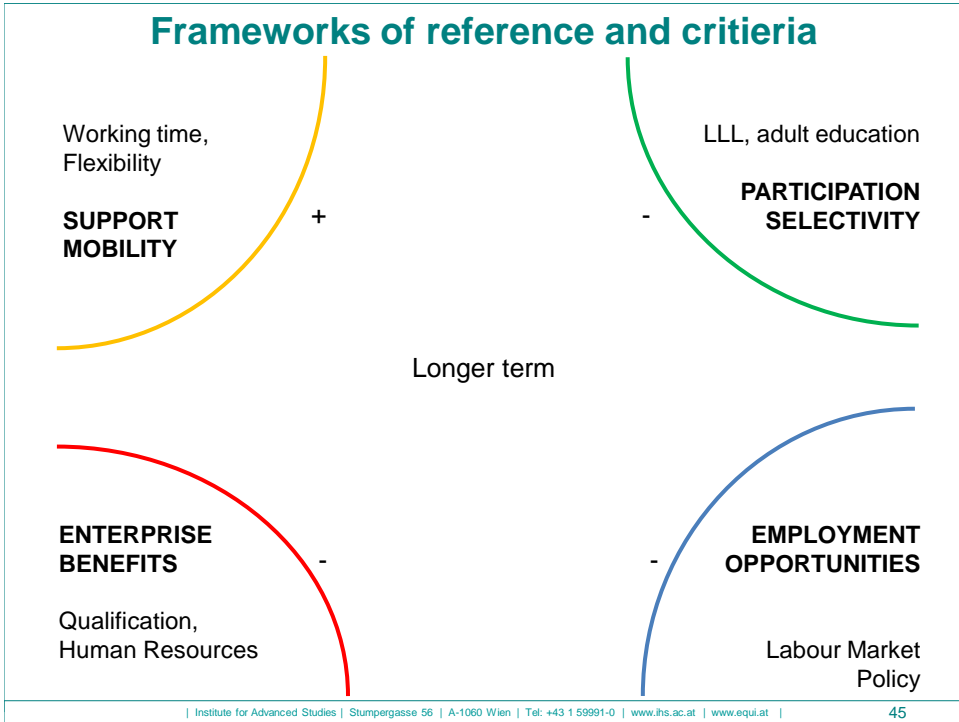


## Very mixed results concerning groups and variables

- Günstige Entwicklung
  - **Meisterprüfung u.Ä.** Vorteile bei Beschäftigung und Einkommen
  - BK auf **Initiative des Arbeitgebers** Vorteile bei Beschäftigung und weniger beim Einkommen, überberufliche Ausbildungen Vorteile beim Einkommen und weniger bei der Beschäftigung
  - Berufliche Ausbildung in **Wirtschaft/Recht** Vorteile beim Einkommen, ungünstig bei der Beschäftigung
  - **ältere TeilnehmerInnen** (50+ Jahre) deutlich erhöhte Beschäftigtenanteile und durchgängig erhöhte Einkommen
  - ein **erworbener Abschluss** oder eine **kurze erwartete Dauer bis zum Abschluss** haben Vorteile bei Einkommen und Beschäftigung
- Ungünstige Entwicklung
  - Berufliche Ausbildung in **Gesundheits/Sozial/Erziehungsberufen** haben durchschnittliche Entwicklung bei Beschäftigung und niedriges Einkommen
  - Ausbildungen für **Studienberechtigung** und **Hochschulausbildungen** mittlere Einkommensentwicklung und ungünstige Beschäftigungsentwicklung
  - **längere Dauern** der BK von 9-12 Monaten ungünstige Entwicklung bei Beschäftigung und Einkommen
  - **mittlere Altersgruppen** verlieren bei Einkommen in Vor- und Nachkarriere
  - **Motiv berufliche Mobilität** Beschäftigung und Einkommen ungünstig

## How to judge the results?

- Depending on different frameworks of reference and criteria

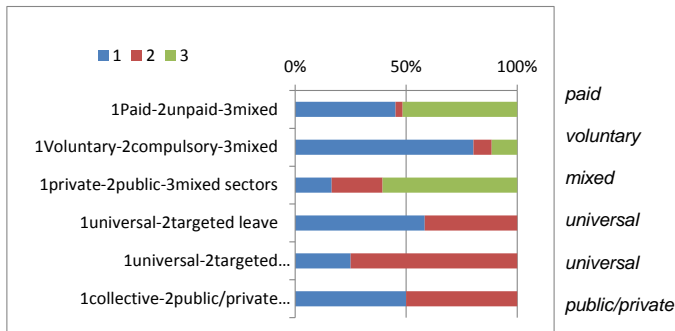


## International and European perspectives

## Cedefop Typologies of training leave in EU, EFTA/EEA and candidate countries

- About 60 instruments
- Five criteria used for typologies

AUSTRIA BK



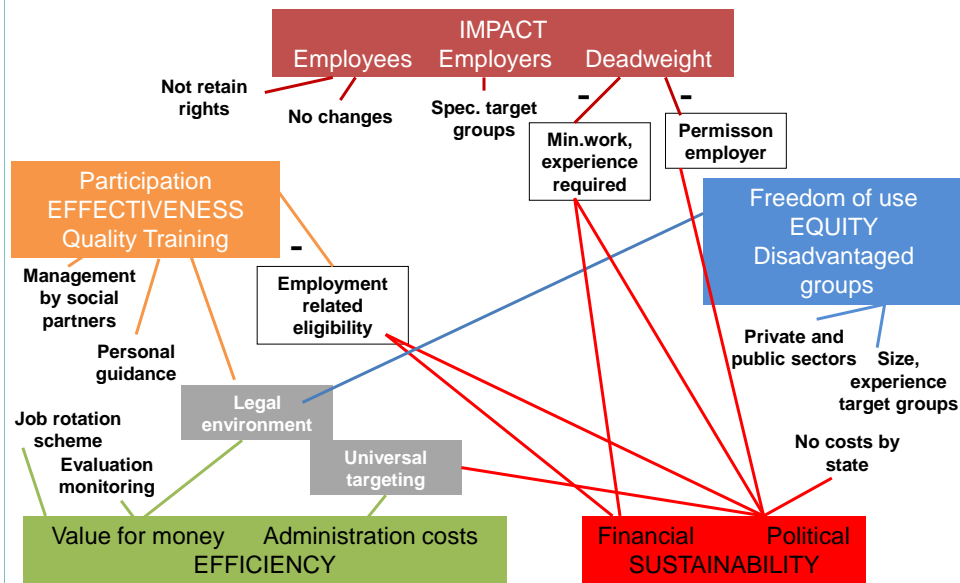
- Success criteria  
effectiveness, impact, efficiency, equity and sustainability
- Successful:

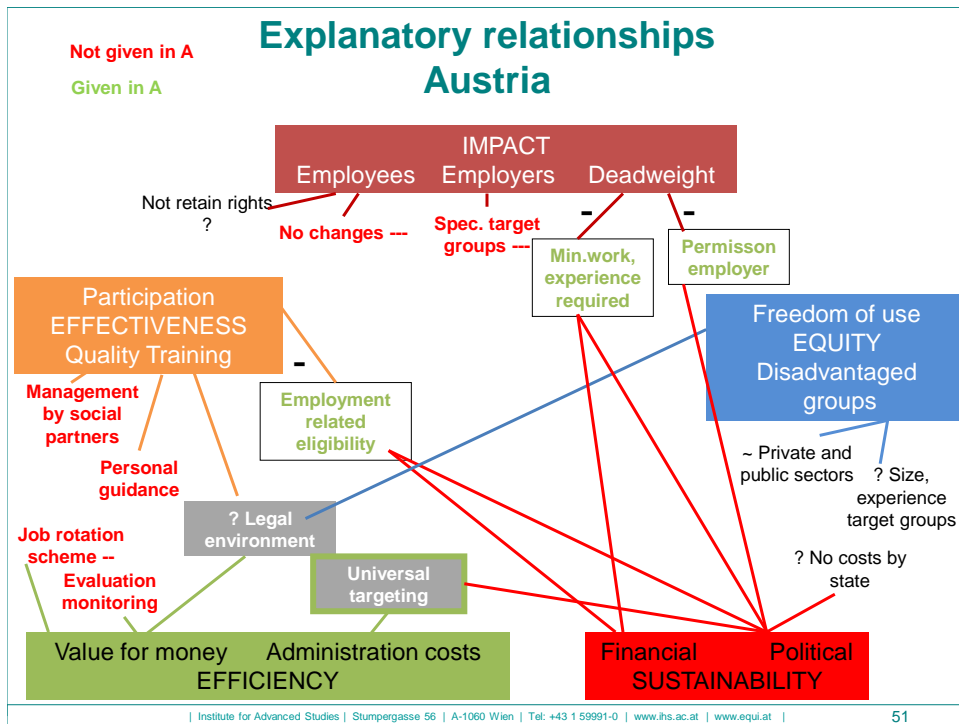


## Success factors

- targeted to certain levels of education and training,
- not foresee any costs of leave covered by social partners
- relatively short duration of implementation;
  
- less employment related eligibility criteria,
- involved both social partners and the state in management
- used state support in covering costs,
- allowed employees to retain all rights they had when working,
- had advanced evaluation and monitoring arrangements,
- operated in favourable legal environment,
- provided only paid leave,
- had links with other cost-sharing instruments
- had employee or employer oriented (instead of more general) objectives.
  
- operated in countries with high trade union density and low collective bargaining coverage
- targeted and supported by the state
- managed to perform with low administration costs, ensure high participation, high impact
- on employers and access of disadvantaged groups and reach high value for money.
- cost seemed to be low political sustainability.

## Explanatory relationships





## Problems of evaluation

- The analysis gives many insights, however, is difficult to use for policy purposes
  
- In case of evaluation of this type of programme we could say
  - What is possible is not sufficient**
  - What would be needed is not possible**

## The End



## Material

