

# THE MARKET OF VOCATIONAL PROFESSIONAL EDUCATION IN RUSSIA IN THE NEW ECONOMIC CONDITIONS

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## ABSTRACT

Since the end of 2014, the Russian economy has undergone major changes. The crisis continued until 2018, followed by stabilization and short-term growth in 2018-2019. The emerging positive trends were interrupted by the pandemic. All this has had a significant impact on the vocational professional education market, both in quantitative and structural terms. The modern world is changing too fast, it is necessary to form the creative potential of a person. The article states that specialists' adaptation mechanisms to new conditions should change with the help of advanced training, obtaining new knowledge and skills in all forms of education, including the system of vocational professional education. This means that the market of educational services formed by state, departmental and corporate educational institutions must respond to the demands of the economy and consumers of these services. Such advanced technologies and methods as online studying should be used along with and in combination with offline classes. The conducted research has shown that large corporations allocate significant funds for the training and retraining of specialists corresponding to the level of technological development, capable of making effective management decisions. The authors of the article note that in the system of vocational professional education consumers of educational services are most interested in training programs related to management, marketing, information and computer technologies, which is quite consistent with the digital economy and the knowledge economy.

## KEYWORDS

Vocational professional education, economic crisis, corporate university, higher education institution, economic conditions, factors, budget, service structures, professional promotion

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# РЫНОК ДОПОЛНИТЕЛЬНОГО ПРОФЕССИОНАЛЬНОГО ОБРАЗОВАНИЯ РОССИИ В НОВЫХ ЭКОНОМИЧЕСКИХ УСЛОВИЯХ

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## АННОТАЦИЯ

С конца 2014 г. российская экономика претерпела серьезные изменения. Кризис продолжался до 2018 г., за ним последовала стабилизация и краткосрочный рост в 2018–2019 гг. Намечившиеся позитивные тенденции были прерваны пандемией. Все это оказало значительное влияние на рынок дополнительного профессионального образования как в количественном, так и в структурном выражении. Современный мир слишком быстро меняется, необходимо формирование творческого потенциала человека. В статье указывается, что должны изменяться адаптационные механизмы специалистов к новым условиям, включающие повышение квалификации, получение новых знаний и умений во всех формах обучения, в том числе в системе дополнительного профессионального образования. Это означает, что рынок образовательных услуг, формируемый государственными, ведомственными и корпоративными учебными учреждениями, должен откликаться на запросы экономики и потребителей этих услуг. Должны использоваться онлайн- и офлайн-формы обучения. Проведенное исследование показало, что крупные корпорации выделяют значительные средства на подготовку и переподготовку специалистов, соответствующих уровню технологического развития, способных принимать эффективные управленческие решения. Отмечается, что в системе дополнительного профессионального образования у потребителей образовательных услуг наибольший интерес вызывают программы обучения, связанные с менеджментом, маркетингом, информационно-компьютерными технологиями, что вполне соответствует цифровой экономике и экономике знаний.

## КЛЮЧЕВЫЕ СЛОВА

Дополнительное профессиональное образование, экономический кризис, корпоративный университет, высшее учебное заведение, экономические условия, факторы, бюджет, сервисные структуры, профессиональное продвижение

## ДЛЯ ЦИТИРОВАНИЯ

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## INTRODUCTION

Since 2017, after three years of stagnation, the Russian economy has entered the growth stage again: according to Rosstat, growth in 2017 was 1.5 %. This is undoubtedly a positive sign, but the relatively high growth rates are ambiguous. In 2018, Russia's GDP grew by 2.3 %, with the largest contribution made by megaprojects, such as the growth of industrial construction due to the implementation of oil and gas projects in Siberia, the preparation for the World Cup and the construction of the Crimean Bridge.

In 2018, for the first time in a long time, the Russian budget turned out to be in surplus – the excess of revenues over expenditures amounted to 2.7 trillion rubles. Unfortunately, these funds are not reinvested in the economy. In the situation of modern Russia, where there is clearly a shortage of investment, a weak balance of regional budgets, a shortage of funds for the implementation of major national projects, as well as a significant drop in real incomes of the population, such a surplus looks extremely ambiguous. The drop in income is due to 3 main reasons: the cancellation of the annual indexation of pensions and other social benefits, weak growth in real wages and the weakening of the ruble against the dollar.

Internal problems of the Russian economy, such as low labor productivity, growing budget deficits in the regions, and insufficient economic diversification, hinder stable growth. The stabilization was associated with the absence of additional external shocks. It was replaced in 2020 by a 3.1 % drop in GDP as a result of the impact of the pandemic. But we cannot speak of the economic situation in Russia as a series of crises and recoveries. The crises reinforced the general trend caused by structural problems of the economy. Russia remains largely a raw material economy with an insufficiently high level of domestic competition and problems with the protection of private property rights. The most important factor of the Russian economy is the high degree of state involvement in economic processes. State investments are made in conditions of limited internal competition. Consolidation of large and medium-sized businesses continues. However, in general, the situation in the Russian economy is manageable. The outlook on the long-term ratings is stable. It is necessary to stimulate investment in the real sector of the economy, stimulate the growth of domestic demand, reduce the tax burden and eliminate uncertainties.

The pandemic and the global crisis of 2020 did not have a critical impact on the Russian economy<sup>1,2</sup>. First, starting in 2014, consumer demand began to decline. The population has adjusted its consumption for a lower quality of life. Since 2015, Russia has already adapted to the new oil prices and the ruble exchange rate. The budget deficit is covered from the National Welfare Fund. Secondly, the Government of the Russian Federation has introduced the minimum necessary measures to support the population and the economy. The state has postponed the payment of taxes to the most affected industries, compensated for interest on loans, and will pay minimum salaries to budget and commercial personnel. The most affected industries include:

- sports and outdoor activities;
- entertainment and mass events;
- restaurant business;
- education and consulting;
- tourism and hotel business;
- public transport;
- all services for the population, except medical services;
- all business services, except remote work;
- all retail trade in durable goods;
- construction and management of commercial real estate.

In the whole year, all the affected industries were at a loss, and the accumulated debt burden increased. In 2021 we estimate that consumer demand will not recover to pre-crisis levels. At the same time, there is little threat to Russia's macroeconomic stability in the coming years. It will be extremely difficult for the new crisis to break through the bottom reached in 2014. Russia's current reserves will last for 5 years of life at oil prices of up to 20 US dollars per barrel.

<sup>1</sup> Mel'nik D. (Thursday 23 Apr. 2020), "Higher education in the world: what problems have been highlighted by the pandemic", *TASS Russian NewsAgency*, available at: <https://tass.ru/opinions/8306213> (accessed 20.03.2022).

<sup>2</sup> RANEPА (2020), Academician Aganbegyan assessed the economic situation of Russia in crisis, available at: <https://www.ranepa.ru/news/akademik-aganbegyan-otsenil-ekonomicheskuyu-situatsiyu-rossii-v-krizise/> (accessed 26.03.2022).

However, during the same period, there was a need for staff renewal, which led to a certain revival of the vocational professional education (VPE) market [Hardy, 2020].

## METHODOLOGY

VPE is aimed at meeting educational and professional needs, expanding and updating knowledge and skills based on the existing specialty without changing the level of education. It can be obtained both on the initiative of the employee and the employer. According to the Labor Code of the Russian Federation, the employer determines the need for additional professional education of employees independently<sup>3</sup>. But in cases stipulated by the legislation, the employer is obliged to conduct additional professional education of employees, if this is a condition for performing certain types of activities. VPE includes the following types of training programs<sup>4</sup>.

1. Professional development programs that provide for the improvement and/or acquisition of new competencies necessary for professional activity, and/or professional development within the existing qualifications. Based on the results of successful development of these programs, a certificate of professional development is issued. The duration of short-term professional development programs is from 16 to 72 hours, long-term lasts more than 72 hours.

2. Professional retraining programs aimed at obtaining the competence necessary to perform a new type of professional activity; the acquisition of new qualifications. According to the results of successful development of these programs, a diploma of professional retraining is issued. The duration of short-term professional retraining programs is from 250 to 500 hours, and the duration of long-term programs is more than 500 hours.

Programs of VPE are divided into the following types of economic activities:

- water supply;
- sanitation;
- organization of waste collection and disposal;
- activities for the elimination of pollution;
- public administration and military security;
- social security;
- administrative activities and related additional services;
- activities in the field of health and social services;
- activities in the field of information and communication;
- activities in the field of culture, sports, leisure and entertainment;
- activities of hotels and catering establishments;
- activities of households as employers;
- undifferentiated activities of private households;
- real estate activities;
- professional, scientific and technical activities;
- financial and insurance activities;
- activities of extraterritorial organizations and bodies;
- mining;
- provision of electricity, gas and steam, air conditioning;
- manufacturing;
- education;
- provision of other services;
- agriculture, forestry, hunting, fishing and fish farming;
- construction;
- wholesale and retail trade;
- transportation and storage.

<sup>3</sup> *Labor code of the Russian Federation dated 31 December 2001 (Federal Law No. 197-FZ of 2001)*, available at: [http://www.consultant.ru/document/cons\\_doc\\_LAW\\_34683/d17243696427a3cc7eb092bb37c57021e5f64abe/](http://www.consultant.ru/document/cons_doc_LAW_34683/d17243696427a3cc7eb092bb37c57021e5f64abe/) (accessed 15.03.2022).

<sup>4</sup> *Federal Law of the Russian Federation dated 29 December 2012 No. 273-FZ “On Education in the Russian Federation”*, available at: [http://www.consultant.ru/document/cons\\_doc\\_LAW\\_140174/18ecc06c654c0f2e1ffdf7fa3f8c1ef137f01615/](http://www.consultant.ru/document/cons_doc_LAW_140174/18ecc06c654c0f2e1ffdf7fa3f8c1ef137f01615/) (accessed 14.03.2022).

#### Categories of students:

- persons holding public positions and positions of the state civil service;
- persons holding municipal positions and positions of municipal service;
- persons discharged from military service;
- unemployed persons in the direction of the employment service;
- employees of educational organizations;
- employees of enterprises and organizations;
- students enrolled in educational programs of higher education;
- students enrolled in educational programs of SVE;
- other.

In the educational market, the end user is always a specific person. For this reason, consumer accounting is one of the key factors for analyzing the market for additional professional education. Among the specialists who are required to regularly improve their skills are: medical professionals; officials engaged in public procurement; employees of the Investigative Committee and the police; prosecutors; notaries; auditors; specialists whose work affects the safety of capital construction projects; employees of organizations for the extraction (processing) of coal (oil shale), who manage mining and blasting operations; heads of private security organizations, etc. Besides additional training is relevant for the following categories of specialists:

- employees who do not work in their specialty;
- specialists with little work experience, who want to systematize their knowledge;
- persons working for a long time with monotonous professional tasks, planning career growth.

Obtaining VPE has a number of advantages for both employees and the company:

1. Career development. Professional development contributes to the professional development of the specialist. Therefore, employees who regularly improve their skills are more likely to get a high position. However, in practice, professional development does not always lead to career advancement and an increase in salary. Some large corporations not only make plans for career growth and professional development of employees, but also conduct training on the basis of their own corporate universities and training centers. In this case, the chances of an employee's career growth are much higher.

2. Reduced staff turnover. If the employer plans and organizes professional development of employees with the prospect of career growth, the staff becomes more satisfied with their own work and loyal to the organization. At the same time, the most capable and talented employees, who like to learn and apply their knowledge in practice, will remain in the company. Thus, staff turnover is reduced.

3. Increase in work efficiency and labor productivity. In the course of training and professional development, the employee gets acquainted with the latest achievements in the field of their professional activity and new methods of work. In case of successful application of the acquired knowledge in practice, additional education contributes to more effective work.

The VPE market grows both in monetary and physical terms (the number of students and academic hours). This was due to the following factors: the discrepancy between basic education and the requirements of the labor market; the legally established duty of professional development for employees in the field of education; the development of an online training format that allows students to study on-the-job and place of residence.

According to our estimate, the volume of the market for VPE in Russia ranged from 51 billion rubles to 104 billion rubles. Almost half came from legal entities (48–49 %), followed by budget sources at all levels (29–37 %) and public funds (15–22 %). More than two-fold discrepancy in the estimation of the absolute size of the market and less significant differences in the structure of funding sources are associated with the difference in the accounting of objects classified as VPE and the accuracy of filling out statistical reporting forms.

## RESULTS

Based on data on the share of the population in the total market share and collected data on the demand for VPE within the federal and regional budgets, as well as the expenditures on VPE of the largest companies (corporate demand) we estimated the market size in 2018–2020 (table 1).

**Table 1.** The volume of the vocational professional education market in 2018–2020

Sector	Volume, bln RUB		
	2018	2019	2020
Companies	37,0	38,8	35,5
State	33,0	35,0	43,4
Persons	12,0	14,0	14,5
Total	82,0	87,8	76

Compiled by the author on the materials of the source [Rosstat]<sup>5</sup>

Separately, it should be noted that in the practice of corporate education, distance learning formats are firmly established – 70 % of companies use both offline and online training.

In physical terms, in 2020, 6 million people were trained under various VPE programs. The structure of students is dominated by employees of enterprises (3.5 million people). However, the highest growth rate was shown by the segment of employees of educational programs, which is associated with the legally established duty of professional development for its employees.

According to the types of students, the largest segments are employees who study at the expense of their enterprises (37 %), at the expense of the state (14 %), at their own expense (11 %).

According to the study “The MBA and Business Education Market of Russia 2021”, which was prepared by Russian analytical agency “RBC Market Research”, in August–December 2021, companies spend on corporate training from 0.11 % to 3 % of the salary fund. Table 2 provides an estimate of the costs of the largest companies in Russia for personnel training.

Thus, the total investment in the training and development of personnel of these companies in 2020 amounted to 29.6 billion rubles. The largest investors are Gazprom, Sberbank, Russian Railways, Rosneft and Rosatom. With the exception of Rosneft, all of these companies have corporate universities.

**Table 2.** Assessment of personnel training costs for the largest Russian companies and the availability of corporate universities, 2020

Company	Income 2020, bln RUB	Estimated training costs, bln RUB	Availability of a corporate university
Gazprom	8,224	5.8	+
Lukoil	7,479	0.8	-
Rosneft	6,850	2.5	-
Sberbank	3,160	4.6	+
RZD	2,413	3.4	+
Rostekh	1,643	1.6	+
Surgutneftegaz	1,537	0.7	-
X5 Retail Group	1,533	0.2	-
VTB	1,361	1.1	-
Magnit	1,237	0.7	-
Rosatom	1,031	2.3	+
Rosseti	1,022	1.3	-
Inter RAO	963	0.4	-
Transneft	932	1.1	-
Tatneft	911	0.3	+
Novatek	832	0.1	-
Evraz	813	0.6	-

<sup>5</sup> Rosstat (2020), Reports on the activities of Rosstat, available at: <https://rosstat.gov.ru/opendata/7708234640-reportsrosstat2021> (accessed 03.03.2022).



End of Table 1

Company	Income 2020 bln RUB	Estimated training costs, bln RUB	Availability of a corporate university
Afk System	777	0.4	-
En +	776	0.5	-
Nlmk	756	0.3	+
Nornikel	729	1.0	+
Megapolis	707	0.0	+
Rusal	645	0.1	+
Total	46,331	29.6	

Source<sup>6</sup>

As for budget allocations, they increase annually (table 3).

**Table 3.** Dynamics of budget allocations for vocational professional education within the federal budget, 2018–2022

Sector	Volume, bln RUB				
	2018	2019	2020	2021	2022
Professional training, retraining and advanced training	10.3	14.6	22.3	24.2	24.6

Source<sup>7</sup>

## DISCUSSION

At the same time, 76 % of the 2020 federal budget allocations for VPE were allocated to the top-6 state programs (table 4.)

**Table 4.** Top-6 state programs in terms of allocations for vocational professional education, 2020

Name of the state program	Amount, bln RUB	Share of total federal budget expenditures on RUB, %
Development of education	2.2	22
Healthcare development	1.7	17
Development ensuring public order and combating crime	1.2	12
Justice	1.0	10
Protection of the population and territories from emergency situations, ensuring fire safety of people on water bodies	0.4	4
Economic development and innovation economy	0.4	4

Source<sup>8</sup>

Higher education institutions remain an important player in the VPE market. Data on them are presented in table 5.

<sup>6</sup>RBC Market Research (2021), *The MBA and Business education market*, available at: <https://marketing.rbc.ru/research/35057/> (accessed 02.03.2022).

<sup>7</sup>Federal law on the federal budget of the Russian Federation 2018-2020 (2017), available at: <https://www.zakonrf.info/doc-35048177/> (accessed 18.03.2022). (In Russian).

<sup>8</sup>Federal Treasury, *Budget Execution* (2020), available at: <https://roskazna.gov.ru/> (accessed 12.03.2022).

**Table 5.** The number of students enrolled in the vocational professional education programs, total income and income per student from their implementation by leading higher education institution in Russia, 2020

Name of hei	The number of students enrolled in the vocational professional education, thousand	Income from the implementation of vocational professional education programs, bln RUB	Income per student, thousand RUB
BMSTU	2.8	198.3	70.8
HSE	24.7	1,405.0	56.9
MSU	13.4	728.0	54.3
SPBU	3.9	157.9	40.5
TPU	4.9	168.6	34.4
RANEPA	75.6	2,247.3	29.7
MISIS	4.1	121.6	29.7
MIPT	5.4	111.2	20.6
SPPU	9.9	183.5	18.5
TSU	2.7	26.4	9.8
MEPHI	8.1	78.2	9.7
TOTAL	155.5	5,426.0	34.9

Source<sup>9</sup>

It seems necessary to distinguish two categories of organizations of additional education: private independent institutions and corporate universities (table 6).

**Table 6.** Financial indicators of the largest organizations of vocational professional education, 2020

Name	Income, bln RUB	Cost of sales of vocational professional education, bln RUB	Share of cost as a percentage of revenue, %	Gross profit, bln RUB
SBERBANK'S CU	3,445	3,254	94,5	191
SKOLKOVO	2,333	2,008	86,1	325
ROSATOM-TA	1,392	1,156	83,1	236
UU	909	523	57,5	386
ROSATOM-CA	886	713	80,6	172
RZD'S CU	757	575	76,0	182
NETOLOGIA	738	649	88,0	88
GEEKBRAINS	482	381	79,1	100
SKILLBOX	341	288	84,5	53
MGTU-SPECIALIST	329	306	93,0	23
GAZPROM-CI	278	247	89,1	30
BMSTU-COMPUTER TRAINING	256	194	76,0	62
RSM	247	156	63,3	91
INVENTA	235	211	89,7	24
MASHPRIBOR	234	154	65,8	80
NORIL'SKII NIKEL'S CU	232	234	100,5	-1

Source<sup>10</sup>

In general, the development of the VPE market in Russia is closely linked to the growth of the online education sector. Among the main trends in this area are:

1. Russian companies are increasingly entering the international online education market. In recent years, companies like Netology-Group, which have been long present on the international market, joined by Algoritmica, PuzzleEnglish, StudyFree and other players.

2. Lack of highly qualified specialists in the online training market. As more and more online schools are launched on the market, there is a growing demand for professional methodologists, producers of online courses, and heads of online schools. In part, the players of the online education market are trying to close this deficit by opening their own training centers.

<sup>9</sup>RBC Market Research (2021), *The MBA and Business education market*, available at: <https://marketing.rbc.ru/research/35057/> (accessed 02.03.2022).

<sup>10</sup>Ibid.



3. New types of service structures are emerging on the market. For example, production courses that offer the launch of online courses “turnkey”.

4. Large Russian companies perceive online education as a promising direction of development. Yandex, Mail.ru and Sberbank invest in educational technology (EdTech) projects.

5. The “hobby-learning” segment is actively growing. Popular areas include personal financial efficiency, painting, applied design skills and motivational courses.

In the foreseeable future the period of creative life will significantly increase, people will be professionally active in the range of 15-75 years. Thanks to the development of technology, the digitalization of the world and the establishment of a strong link between education and career, they will be able to rapidly acquire new skills and even new professions, retrain the right number of times and constantly increase their own value. Digital skills are no longer the lot of IT employees and become the “new English”, i.e. it is difficult to talk about a successful career in the company without these skills.

The most popular directions in additional online adult education are:

- teaching foreign languages to adults;
- marketing, communications, sales and advertising;
- IT;
- design (interior, web, etc.);
- management.

The top most popular areas of additional adult education include:

- training in production and working specialties;
- teaching foreign languages to adults;
- marketing, sales, advertising and communications;
- finance, accounting, tax accounting;
- creativity (art, painting, photography).

As for the formats of online courses in the field of hobbies, personal growth and development, as well as soft skills, the trend for educational products for mastering micro-skills is increasing (for example, in drawing – a mini-course on hatching).

According to the results of the Interfax study<sup>11</sup>, the volume of the Russian EdTech education market in the adult audience segment increased by more than 20 % last year, to 45–50 billion rubles in monetary terms.

The research is based on the analysis of indicators of the national market and the leading countries of the global EdTech industry, data from the SCAN-Interfax information and intellectual system, as well as expert surveys of specialists in additional professional education and EdTech from Russian universities and representatives of Russian EdTech companies.

In the structure of the global EdTech industry Russia occupies about 1 %, but the growth rate of the national market is very high: 20–25 % per year. In 2018 the capacity of this market was approximately \$ 600–650 million, which is approximately 35–40 billion rubles. In 2019 the capacity of the Russian EdTech market can be estimated at 45–50 billion rubles.

It is noted, that by 2020, this figure may reach 55–60 billion rubles. According to Interfax estimates, by 2035 the turnover of Russian companies in the EdTech education market will be at least \$20 billion.

In the structure of EdTech in Russia 50 % (22–25 billion rubles) is accounted for by additional education and VPE for adults, including language learning. It is expected, that in 2020 the volume of this segment will reach 27–30 billion rubles.

According to the research, among the main directions of VPE for adults are training in digital professions, applied professions, learning foreign languages, as well as the niche of developing methods and tools for corporate training.

The market leaders in these categories are the online university Skillbox, GetCourse, SkyEng and Mirapolis.

According to experts, VPE programs in Russia are used by 15 % of the working-age population and more than 1 % of retirees. The cost of additional education increases by 1.5–2 % per year. According to forecasts, by 2021 they will amount to about 2 trillion rubles<sup>12</sup>.

<sup>11</sup> Interfax International Information Group (2021), *Russian market of educational technologies in vocational professional education and additional adult education*, available at: <https://academia.interfax.ru/ru/analytics/research/4257/> (accessed 05.03.2021).

<sup>12</sup> Ibid.

According to experts, digital platforms can effectively coexist with traditional educational institutions.

In the 2020s, the blended learning model will become widespread. For example, online platforms will provide content and select methods of working with students; universities will bring together practitioners, representatives of academic sciences and students themselves. By 2024 up to 30 % of the VPE programs in Russia will be available in an online format. Online education will replace full-time formats in general, higher and additional professional education.

Industry representatives note that in 10 years the division into EdTech and classical education will disappear – there will be a unified market. Universities are planning to drop the prefix “online” in their school names to emphasize that they are engaged in education in general [Downes, 2016].

Another important trend is the awareness of the education market players of the need not to compete now, but to engage in collaboration.

In order for major positive changes to begin in this market, its participants need to learn how to build a dialogue with each other, to make joint projects. Only then a new stage in the development of the industry will begin, when EdTech companies are able to share freely their technologies and digital platforms with universities, receiving in return the best practices in pedagogy, scientific and academic issues.

Representatives of classical universities, in turn, realize that they need to be prepared for new challenges from EdTech companies.

The world has changed: previously, you could get a profession and work all your life in your specialty. This is what we were proud of 10 years ago: one profession, one university, one entry in the employment record. Now, in order to be successful, a person is forced to change jobs, fields of activity and specialties more and more often. And educational institutions must be ready to meet these challenges. Because if they don't, then other companies and people will answer these questions.

## CONCLUSION

Thus, corporate universities are the market leader in the VPE market. It seems necessary to note the main trends and features of these players.

1. The infrastructure of modern corporate universities is focused on supporting the implementation of corporate changes, including those related to digitalization.
2. Corporate universities build a full cycle of competence management in the enterprise.
3. The importance of cooperation with universities and other higher education institutions in the development of joint training programs is growing.
4. More significant growth of the corporate universities segment in the digital space due to greater flexibility and speed of decision-making.
5. Corporate universities are both partners and competitors of universities. The main direction of their interaction is digitalization programs and the creation of corporate educational platforms.

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