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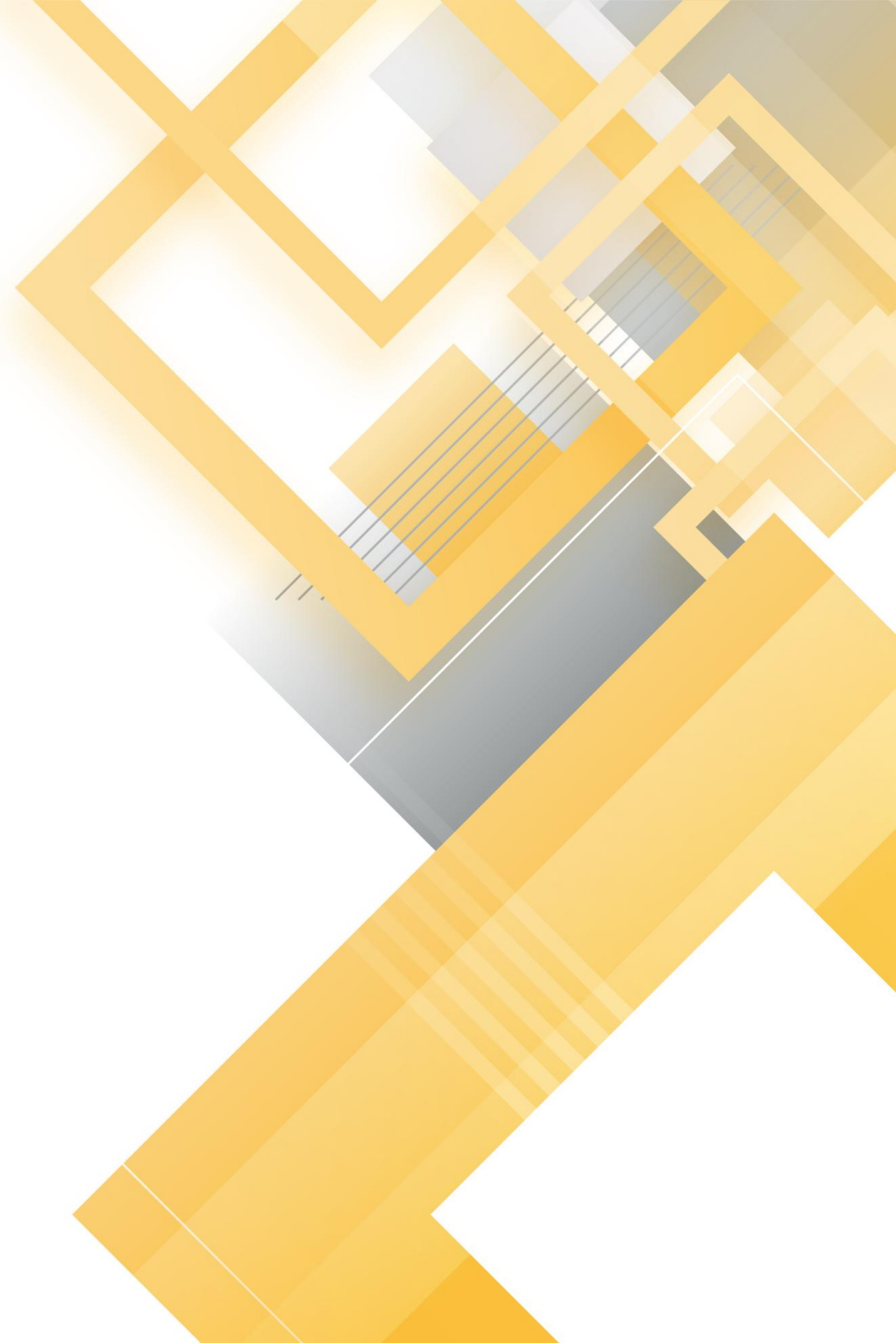
Skills anticipation and labour market intelligence in the conditions of turbulence: Ukrainian case

ETF Skills Lab Network of Experts – Regional webinar (Eastern Partnership)

October 6, 2026



Factors and challenges that influence labour market of Ukraine





War



Four years of Russia's full-scale invasion have caused profound and lasting damage to Ukraine's economy

Macrolevel

Direct physical damage – 195, bln \$

Reconstruction demands – 587, 7 bln. \$

GDP decrease (comparing 2021) - -21%

Unemployment (only official data) – 10,2%

Impact on education

Direct damage to education and science infrastructure and assets reached USD 13.9 billion by the end of 2025, representing about 7.1% of all direct physical damage in Ukraine (*RDNA5, 2026*).

Sources (World Bank, United Nations and the European Union issues Rapid Damage and Needs Assessment, 2026)



Demography

Macrolevel

Population of Ukraine in 2001 was around **48,5 mln**

July 2024 - **31,1 mln** (*according to the Institute of Demography, 2025*).

Around 5,75 mln are refugees (*UNHCR, 2026*)

3,7 mln – Internally Displaced People (IDPs) (*UNHCR, 2026*)

Till 2041 the population of Ukraine could decrease to
by **28,9 mln**, and till 2051— by **25,2 mln**

Impact on education

Educational institutions (July 2024)

- 630 HE institutions
- 707 colleges
- 633 Vet schools

Total capacity to deliver training up to **2 mln. in a year.**

As of 01.07.24 – in all above mentioned institutions there were around **1,2 млн.** of students (without school contingent) :

- 143 000 – VET
- 270 000 – Colleges
- 797 000 – HE institutions (both bachelors and masters)



What happens now?

Students are key factor of survival, but not skills

Positive

- Educational institutions entered in highly competitive conditions of functioning
- The offer becomes more attractive, institutions are interested in upskilling their pedagogues and improve material base
- Educational programs and forms of learning become more flexible
- Employers play more and more important role and improve the level of cooperation with the educational institutions

Negative

- The battle for student enrollment is prevailing over the quality of education.
- The desire to please employers by aligning the curriculum with their requirements leads to the fragmentation of skills.
- Competence-based approach for curricula is being implemented with different speed in different spheres of education (high in VET and low in Colleges and HE)
- Occupational standards (vault of skills) are developed without a necessary level of control and their development is rather market-oriented than system-oriented



How all this affect the skills need anticipation system in Ukraine?



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Assumption 1– There is no sustainable system of skills anticipation in Ukraine

What do we have?

- There are well-developed forecasting system in Ukraine, but it is oriented at forecasting needs of people (workers, specialists) in 5 years perspective.
- It is closely linked to the budget subsidies that educational institutions obtain from the central and regional budgets, and this system does not include skills dimension.
- Present studies and research documents show great demand in skills anticipation from the international organisations (WB, EIB) and donors (GIZ, Swiss, Belgium, Sweden international cooperation agencies)

What we need?

- State policy of skills need anticipation status in the general mechanisms of macro-economic forecasting.
- Authorised body and implementation mechanism(s) of skills needs anticipations
- Network of experts and stakeholders to collect and validate the skills needs



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Assumption 2– There are some elements of skills need anticipation

What do we have?

- National qualification framework
- National Qualification Agency as a state body that initially had a function of the skills anticipation but lost it at later stages of functions' adjustment process
- Examples of skills anticipation mechanisms (2 years practice of employers' survey where this question is asked done by SES in cooperation with national associations of employers with HELVETAS support)
- Several reports mostly done by international organisations (World Bank, EBRD) EC agencies (ETF) and international donors (GIZ, HELVETAS) with examples of skills needs anticipation

What we need?

- General understanding of the need of changing forecasting paradigm from calculating people to skills need anticipation
- Legal regulation
- Implementation mechanism
- Understanding of the final result – where and how these results will be implemented?



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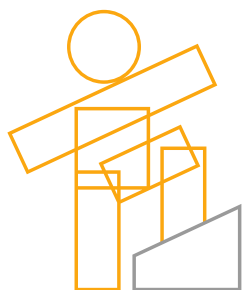
Where and how these results will be implemented?

Challenges

- War and unpredictable nearest future – difficult to make any type of forecast
- Change of paradigm (people vs skills need) most probably cause resistance from the educational system
- New skills will depend on new technologies and processes which are not well known could lead to the low level of competitiveness of Ukrainian specialists
- Big volumes of investments needed

Opportunities

- Quality of skills would become more important
- Change of state and municipal budget for education needs
- More important role of employers (challenge at the same time)



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КВАЛІФІКАЦІЙ

+380 50 727 8970

office@ipq.org.ua

ipq.org.ua