

## Im Auftrag des Wiener Arbeitnehmer\*innen Förderungsfonds



## und der Arbeiterkammer Wien



### Summary

The second study on Vienna's educational institutions commissioned by waff and AK shows that the Corona crisis has accelerated the digitalization of training and further education offerings and provided new impetus for qualification. The widely diagnosed “digitalization push” occurred both at the teaching/learning level and at the organizational level, accompanied by new tasks and a change in the required competencies and skills of trainers. In terms of content, the effects of digital transformation on educational institutions can be summarized into **four main components** using factor analysis: **developments in the educational offering** (development of new target groups, development of supra-regional further training markets, greater competition in the further training market), **technical developments** (greater importance of the technical infrastructure, greater importance of the technical Personnel, greater digital professionalization of trainers), **organizational changes** (new collaborations and network structures, need to develop new business areas, change in organizational culture, development of innovative offers) as well as **personnel requirements and availability** (no decrease in the need for trainers, no more difficult recruitment of new trainers ).

The current status of digitalization shows that the developments and upheavals of the last few years have already become entrenched in a new everyday life for educational institutions. Almost two out of three educational institutions now have extensive experience with the use of digital media and methods. This share has more than doubled since 2019. Another 26% of the facilities are in the experimental and testing phase; Only around 10% do not yet use them - sometimes consciously.

When asked about the central reasons for using digital media and formats to convey educational content, education providers cited four motives: greater spatial and temporal flexibility of the offering, reaching new target groups and increasing the reach and attractiveness of the offering. Qualitative aspects such as improving learning methods and didactics as well as achieving better learning results are of secondary importance in comparison and were mentioned significantly less frequently in the current survey than was the case in 2019.

The open feedback shows that the Covid-19 pandemic has made it necessary to further develop digitalization in training and further education offerings. The time since then has been used accordingly. Digital offerings, especially mixed forms with online and face-to-face phases, are now playing a growing role and have become an integral part of the portfolio of many educational institutions. The majority of institutions already offer training and further education in digital formats. The use of digital tools such as video conferences and the use of digital materials in the form of audio, video or writing have become commonplace in many areas. To this end, large investments have been made since 2020, which have been financed by the institutions primarily from their own resources.

The development of face-to-face formats has been heavily influenced over the last few years by the general conditions during the Corona pandemic. For the immediate period before the pandemic, 86% of the representatives of educational institutions surveyed stated that the offering consisted (almost) exclusively of face-to-face formats. The current situation in 2023 shows that the proportion of these facilities is significantly lower (36%). The trend suggests that the proportion of institutions that primarily focus on face-to-face formats will continue to decline (23% for 2026).

When asked about future trends in further education, the topic of “artificial intelligence” (AI) is most often mentioned, although it is not currently relevant for all educational institutions. Around a third of those surveyed currently see AI as an important and significant field of development, and some are working on corresponding offerings. The proportion of those for whom AI is not (yet) an issue is just as large. The third part of the educational institutions definitely finds this aspect exciting and interesting and sees artificial intelligence as an opportunity, enrichment, field of development and future topic for the coming years. Inflation poses major challenges for both educational institutions and participants.

Half of those surveyed stated that these increases were very or somewhat difficult for their institution to cope with. The reactions of educational institutions to inflation are immediate and complex. Seven out of ten institutions respond by increasing prices/participation fees. In addition, a high proportion focus on efficiency in the sense of eliminating educational offerings with low demand (56%) and on measures to increase utilization (44%). Changes in customer demand behavior include, in particular, increased demand for funding opportunities (53%), price discounts (38%) or shorter offers (31%).

Since 2019, the Digi-Winner has been positioned as a new funding offer in the differentiated Vienna funding landscape (e.g. waff, AK, AMS) specifically for vocational training and further education in the area of digitalization. Around half of the Viennese continuing education providers surveyed (or more specifically the managers who took part in the survey) are currently aware of the Digi-Winner as a funding offer.

The level of awareness of the new “Climate Winner” funding program within the Viennese educational institutions surveyed is at 13% - which can be explained by the introduction of the funding program immediately at the time of the survey. The possible influence of the Vienna Climate Winner on the educational offerings or the demand for educational offerings in the area of “climate protection, decarbonization and sustainability” could not (yet) be assessed by the majority at the time of the survey. Those surveyed who gave an assessment were predominantly of the opinion that this funding opportunity can at least partially increase supply and demand. The development of tailor-made offers for target groups in the area of sustainability can be seen as a task for the next few years, especially since the majority of educational institutions (especially larger providers) plan to further expand offers in the area of “climate protection, decarbonization and sustainability” in the near future.

Lachmayr, Norbert & Schmatz, Thomas (2024): Befragung von Wiener Bildungseinrichtungen: Digitalisierung & Klimaschutz, Endbericht des Österreichischen Instituts für Berufsbildungsforschung (öibf). Wien: öibf.

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**Bibliographic information about the study (available in German at [www.oeibf.at](http://www.oeibf.at))**

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