Research into the Financing of Technical and Vocational Education and Training (TVET) in the Pacific

Managed by the Australian Council for Educational Research
and Scope Global on behalf of the Australian Government

Samoa
Country Report

Leo Maglen
Justin Brown
Salā Perive T. Lene

August 2013

Australian Government
Department of Foreign Affairs and Trade

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First published 2015
by Australian Council *for* Educational Research Ltd
19 Prospect Hill Road, Camberwell, Victoria, 3124, Australia

www.acer.edu.au

Paperback ISBN [978-1-74286-272-9]
EPUB ISBN [978-1-74286-273-6]

National Library of Australia Cataloguing-in-Publication entry

Creator: Maglen, Leo, author.
Title: Research into the financing of technical and vocational education and training (TVET) in the Pacific. Samoa country report / Leo Maglen, Justin Brown, Salā Perive T. Lene.
ISBN: 9781742862729 (paperback)
9781742862736 (e-pub)
Subjects: Technical education--Economic aspects--Samoa.
Technical education--Samoa--Finance.
Vocational education--Economic aspects--Samoa.
Vocational education--Samoa--Finance.
Other Creators/Contributors:
Brown, Justin Patrick, author.
Lene, Salā Perive T., author.
Dewey Number:
370.113099614

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

LIST OF ACRONYMS

AAA	Analytic and Advisory Activities
ACER	Australian Council for Educational Research
AES	Apprenticeship and Employment Services
ANZSIC	Australia and New Zealand Standard Industry Classification
APTC	Australia-Pacific Technical College
ASMOAF	Australian Salesian Mission Overseas Aid Fund
AusAID	Australian Agency for International Development*
CAT	Certificate in Adult Teaching
CBT	Competency Based Training
CCCE	Alafua Centre for Community and Continuing Education
CEDEFOP	European Centre for the Development of Vocational Training
DBS	Don Bosco Samoa
DBTC	Don Bosco Technical Centre
DFAT	Department of Foreign Affairs and Trade (Australia)
EPPD	Economic Policy and Planning Division
ESPII	Education Sector Program
GoS	Government of Samoa
IAP	Industry Advisory Panels
IFC	International Finance Corporation
IHE	Institute of Higher Education
IoT	Institute of Technology
ISCO	International Standard Classification of Occupations
JICA	Japan International Cooperation Agency
LMS	Labour Market Survey
LPTC	Laumua o Punaoa Technical & Vocational Centre
MCIL	Ministry of Commerce, Industry and Labour
MESC	Ministry of Education, Sport and Culture
MoF	Minister of Finance
MTEF	Medium-term Expenditure Frameworks
NRG	National Reference Group
NUS	National University of Samoa
NZ	New Zealand
NZAID	New Zealand Agency for International Development
ODA	Official Development Assistance
PBC	Planning and Budget Committee
PQF	Pacific Qualifications Framework
PSC	Public Service Commission
PSET	Post-School Education Sector
SBGS	School of Business and General Studies
SBS	Samoa Bureau of Statistics
SHC	School of Hospitality and Community Services
SICTP	Samoa In-Country Training Program
SMT	School of Maritime Training
SOE	State-owned Enterprise
SoE	School of Engineering
SQA	Samoa Qualifications Authority
SQF	Samoa Qualifications Framework
STT	School of Trades and Technology
SUNGO	Samoa Umbrella for Non-Government Organisations
TIAS	Tesese Institute of Administrative Studies
TVET	Technical Vocational Education and Training
USP	University of the South Pacific
UTVC	Uesiliana Technical & Vocational Centre
VCC	Vice Chancellor's Committee
WST	Samoan Tala currency

*AusAID was integrated into DFAT in October 2013. Citations of AusAID documents or programs in this report refer to the authorship or structure before that time.

PREFACE

The project *Research into the Financing of Technical and Vocational Education and Training (TVET) in the Pacific* was managed by the Australian Council for Educational Research (ACER) and Scope Global on behalf of the Australian Government. The project was undertaken between 2012 and 2014 under contract to the Australian Government, initially through AusAID and then the Department of Foreign Affairs and Trade (DFAT).

The study was conducted in seven Pacific countries: Fiji; Kiribati; Papua New Guinea; Samoa; Solomon Islands; Tonga; and Vanuatu. The aims of the research were to produce, in conjunction with host country governments and TVET stakeholders, comprehensive analyses of the systems for financing TVET and discussions of policies through which the financing of TVET could be made more efficient and effective. This volume is one of the seven country reports produced by the study.

I am very appreciative of the assistance provided by Leo Maglen as Research Coordinator, Jim Jones as Operations Manager, and Justin Brown who worked across all seven studies. I am also very appreciative of all the work done by the members of the seven country teams:

Fiji: Leo Maglen (Lead Researcher), Mark Weston Wall (Researcher), Manaini Rokovunisei (National Consultant), Daniel Lafu Taufaga (In-Country Manager)

Kiribati: Prabir Majumdar (Lead Researcher), Teweiariki Teaero (Researcher), Linda Uan (In-Country Manager)

Papua New Guinea: Robert Horne (Lead Researcher), Ken Ngangan (Researcher), Simaima Tavil-Melachon (National Consultant), Meghan Toka and Peter Mulligan (In-Country Managers)

Samoa: Leo Maglen (Lead Researcher), Justin Brown (Researcher), Salā Perive T. Lene (National Consultant), Frances Soon-Schuster (In-Country Manager)

Solomon Islands: Andrea Bateman (Lead Researcher), Elizabeth Cassity (Researcher), Judy Fangalasuu (National Consultant), Bob Pollard (In-Country Manager)

Tonga: Andrea Bateman (Lead Researcher), Justin Brown (Researcher), Meleoni Uera (National Consultant), David Wyler (in-Country Manager)

Vanuatu: Ray Powell (Lead Researcher), Julie Kos (Researcher), Henry Vira (National Consultant), Kathryn Nako (Consultant), Lou Cochrane (In-Country Manager)

The project benefited greatly from the engagement and input from the seven participating national governments, the National Reference Groups established in each country, the relevant DFAT country posts, TVET authorities and providers, NGOs, employers, regional organisations and a range of other TVET stakeholders. Without their contributions and willingness to work with the research teams, the project would not have been possible.

I would also like to gratefully acknowledge the assistance provided by the Research Steering Committee chaired by Kaye Schofield, the reviewers of draft reports, and the DFAT managers of the project.

The analyses, opinions and conclusions herein do not represent the views of DFAT, national governments, or any other organisation or individual, unless stated otherwise.

Phillip McKenzie
Project Director
ACER

ACKNOWLEDGEMENTS

There are a great number of people who contributed freely of their time and information to help make this study possible. To them all we extend our sincere thanks. They ranged across government ministries, education and training institutions and private TVET providers, state owned enterprises and private corporations. We would like to single out some for a special vote of thanks. This does not, however, in any way diminish our appreciation of the others who contributed.

We would like to thank Hinauri Petana, the Chair of the Samoa Qualifications Authority (SQA) Board , and her fellow board members, for agreeing to act as our National Reference Group. This provided an invaluable point of reference, and we much valued the advice and assistance they were able to provide. Moreover, their support contributed greatly to the high degree of cooperation we received from all whom we approached.

We are, of course, enormously grateful for the initial and on-going support for our study provided by Fepulea'i Sinapi Moli, the Chief Executive Officer of SQA. Sinapi and her colleagues at SQA provided crucial input into the program.

Dr Emma Kruse Vaai, Deputy Vice Chancellor, Taito John Roach, Director of Financial Services, and his assistant, Saulaulu U Moananu, and Luagalau F Eteuati-Shon, Registrar, of the National University of Samoa, were particularly helpful in providing advice and information about the university's TVET operations and finances. They and their colleagues in the faculties and in the Oloamanu Centre have our warm appreciation.

Sister Monica Vaipuna at Don Bosco (Alafua), and others amongst the TVET private providers, also deserve a special vote of thanks.

The study would not have been possible without the information and advice provided by Leasiosiofa'asisina Oscar Malielegaoi , Assistant CEO (Budgets) and his colleague Peseta Noumea Simi, Assistant CEO (Development Assistance), Ministry of Finance. Others in the Government of Samoa whose assistance we appreciated include the senior management and officers of the Samoa Bureau of Statistics, Ministry of Commerce, Industry and Labour, and the Ministry of Education, Sports and Culture. The team would also like to thank the CEOs of the state-owned enterprises and private corporations that participated in our enterprise training survey.

A major participant in TVET in Samoa is the Australia Pacific Technical College (APTC). We would like to thank Mr John Maddock, Chair of the Board of APTC and his fellow board members; Mr Barry Peddle (former CEO); Ms Jenny Dehn, Manager, Administration in Nadi, Fiji; and Ms Frances Howes, Campus Manager, APTC Samoa, for their assistance.

We would like to thank Valma Galuvao and her colleagues at the Australian High Commission in Apia for their assistance. We also wish to acknowledge the logistical support and other assistance provided by Frances Soon-Schuster and Auimatagi Bob Ale at Scope Global (formerly Austraining International).

The views expressed in the report are ours, as is responsibility for any errors and omissions.

Leo Maglen
Justin Brown
Salā Perive T. Lene

EXECUTIVE SUMMARY

1. The Samoa Country Study Report into the Financing of TVET forms part of a region-wide program *Research into the Financing of TVET in the Pacific* initiated by the Australian Agency for International Development (AusAID) in 2011. The study team for Samoa commenced its field investigations in July 2012 and completed them in September 2012.

2. The aims of the program, as identified by its *Research Brief,* are to produce, in conjunction with host country governments and TVET stakeholders, a comprehensive empirical analysis of the existing systems for financing TVET in seven Pacific countries (Fiji, Kiribati, Papua New Guinea, Samoa, Solomon Islands, Tonga and Vanuatu), identify key financing issues within the region, and identify policies through which future financing for TVET could be made more efficient and effective at both national and regional levels.

3. The *Research Brief* requires the systematic gathering and analysis of information under four broad headings:

    - Sources of funding for TVET;
    - Expenditure patterns and trends in TVET;
    - Financial mechanisms for channeling funds to and facilitating expenditure on TVET; and
    - Costs of TVET delivery.

4. The first task of the study team, outlined in Chapter 2 of the report, was to determine the scope of TVET in Samoa. The broad definition provided in the *Research Brief* for the purpose of the research is as follows:

    > *Post-secondary education and training programs designed to develop vocational skills. Degree and higher level programs, and subjects delivered as part of general education by secondary schools, are not included in this definition.*

5. Under this definition, the broad parameters of the TVET sector in Samoa were identified as:

    Public provider
    National University of Samoa (NUS)
    - Faculties of Applied Science, and Business and Entrepreneurship
    - Oloamanu Centre for Professional Studies and Continuing Education

    Private providers
    Don Bosco
    Laumua o Punaoa Technical & Vocational Centre (LPTC)
    Uesiliana Technical & Vocational Centre (UTVC)
    Tesese Institute of Administrative Studies (TIAS)

    Regional providers
    Australia-Pacific Technical College (APTC)
    University of the South Pacific (USP) Alafua Centre for Community and Continuing Education (CCCE)

    Other structured training providers
    Other government ministries – primarily the Ministry of Agriculture
    Samoa Umbrella for Non-Government Organisations (SUNGO) and Samoa Chamber of Commerce and the Public Service Commission (for the Samoa In-Country Training Program)
    Employers in the SOE and private corporate sectors

TVET regulators

Samoa Qualifications Authority (SQA)
Ministry of Commerce, Industry and Labour (MCIL) – Administration of the Apprenticeship Scheme and Employment Services

6. The next tasks of the study team were to review the full scope of data available on the operations and finances of the TVET sector so defined, to assess its quality in terms of comprehensiveness, reliability, timeliness etc, to identify where gaps appeared and to devise means of covering those gaps within the time and resources of the study team.

7. The team found that there is a remarkably large amount of published and unpublished material available that directly or indirectly relates to the TVET sector, and much of it is current. However, a good deal of it is short on specifics, regarding detailed statistical information about enrolments in, graduates from, or the staffing and resourcing of, the TVET sector as defined by the *Research Brief*, whether that information be for the current state of the sector, past trends or future projections.

8. In order to augment existing information sources, the study team carried out a targeted set of data collection exercises, namely:
   - a questionnaire asking NUS to provide detailed up-to-date data on their TVET operations and finance;
   - a survey of all private TVET providers, seeking the same set of information as that asked of NUS;
   - a questionnaire asking APTC to provide detailed up-to-date information on the operations and finance of their Samoa campus, as part of a wider enquiry of all their operations across the Pacific; and
   - a small representative survey of employers in the state-owned enterprise and private corporate sectors seeking information of the extent of the training they provide their employees, and how they fund it.

9. The results of these data collection exercises, combined with the information available from existing official sources and previous commissioned studies are analysed in Part IV of the report.

10. Part IV begins with Chapter 12, in which an overview is provided of the latest available funding and expenditure estimates for the TVET sector, as defined by the *Research Brief*. It contains a summary of the funding of major providers of structured TVET programs, ones that lead to the award of certificates and diplomas, and is followed by a similar summary of expenditure patterns amongst these providers. It also includes estimates of other funding and spending on less structured TVET programs.

11. The report estimates that the share of GDP spent on TVET ranges between 2 and 2.5 per cent of GDP in 2011. These high-level findings are made possible after aggregating expenditure data for public and private providers, making assumptions regarding employer expenditure on training their own middle-level employees and adjusting for the regional components of APTC expenditure.

12. Major sources of funding are identified as Government of Samoa and development partner funding, tuition fees and other student and community contributions, church and industry support.

13. The impact of output-based budgeting, and the status of NUS and SQA as public bodies, not government departments, are examined, as is the inclusion of SQA, NUS and state support for private TVET providers in annual MESC appropriations.

14. The gradual integration of all publicly provided TVET into NUS, and the impact this is having on its financing, is an important theme picked up in this chapter. Development partner funding of TVET has in recent years come largely from the Australian Government, and through its regional programs rather than its bilateral program. That makes how APTC funds its operations in Samoa of critical importance to this study.

15. Three of the four private TVET providers are church-run not-for-profit institutions, two through the Methodist Board of Education of Samoa, and the other through the Salesians of Don Bosco of the Australia Pacific Province. In all instances the parent bodies largely subsidise their operations, with student fees and government support being minimal. The other is a private family-run for-profit operation. It relies overwhelmingly on student fees to finance its operations. Government grant assistance is minimal.

16. Detailed analysis of TVET funding and expenditure patterns are contained in Chapter 14.

17. MOF annual budget appropriations are the major source of recurrent funding for public TVET, and the picture to emerge in recent years is clear – the share going to TVET providers (both public and private) and to their regulatory body SQA, are comparatively very small and ,except for the newly established SQA, relatively static:
    - While over the four-year period 2009-10 to 2012-13 MoF annual recurrent expenditure estimates increased on average by five per cent per annum, the estimates for the various TVET recipients had quite different trajectories.
    - The TVET component of NUS remained relatively unchanged, as did the share allocated to mission and private providers. In contrast, the funding for SQA increased overall by around 14 per cent per annum.
    - Annual MoF recurrent budget appropriations for the entire education and training sector, channeled through MESC, run to between 18 and 20 per cent of total annual recurrent budget appropriations. Between two and three per cent of this flows on to NUS for all its operations.
    - Appropriations for NUS's specifically TVET-related outputs, and for SQA, both accounted for less than one per cent of the total annual government recurrent budget. Grants to all mission schools, for distribution not just to TVET colleges run by the churches, are barely above that figure.

18. The TVET sector share of public development fund spending is also extremely low. The development budget is entirely funded by international development partners. At the time of writing the education sector received about 12 per cent of these funds, mostly in the form of grants. However, less than 0.6 per cent found its way to the TVET sector. This does, of course, understate the contribution development partners make to the sector, because it excludes the assistance provided through the operations of APTC. This assistance falls under Australia's regional program, and does not get recorded as part of its bilateral assistance to Samoa under the Australia Samoa Partnership for Development.

19. As a public body NUS has greater autonomy than a line ministry over its funding and expenditure patterns. The impact of this, and how its TVET operations have fared within the overall budgetary environment in NUS are examined in Chapter 14.

20. Chapter 14 also draws comparisons between private TVET providers in the level and composition of their funding and expenditures, and between these providers and the NUS TVET operations.

21. The major source of difference in recurrent spending patterns is in the level of teacher remuneration – NUS TVET teachers and instructors earn considerably higher salaries than their private provider counterparts, especially since the merger with NUS's higher education operations

22. Tuition fees are charged by all providers both public and private, but comparisons with household income survey data reveal they are set at such high levels that many families in lower income deciles could not afford to pay them, without the assistance of scholarships or other forms of fee relief.

23. Current development partner support for TVET comes in the form of a number of small bilateral programs – the Australian Government funded TVET Support Program, the joint Australia-New Zealand funded Samoa In-Country Training Program, and one large regional program, the APTC's operations in Samoa. The latter program is much larger than the other two.

24. The APTC operations in Samoa are part of an integrated regional program that caters not just for Samoan students, and has extensive back-up and support services delivered by its management in Australia and through its headquarters in Nadi Fiji. This results in the Samoan APTC campus having disproportionately much higher overheads than any of the national TVET providers. This, coupled with the much higher personnel costs incurred as a result of employing expatriate teachers, means that APTC's operating costs are much higher than any other TVET provider. The impact this has on unit costs of operations is analysed in Chapter 16.

25. To address the information gap relating to industry funded and conducted training, Chapter 15 reports on the small pilot study of enterprises that the team conducted to focus on obtaining information about employers' own training programs for new recruits and existing employees, and about who conducts them and how they are funded.

26. The survey collected information from a representative, but not randomly selected, sample of thirteen of the largest enterprises in Samoa, drawn from across the public and private sectors.

27. Generalising from a sample this small is difficult and inconclusive, but what was clear is that the incidence of training is widespread amongst employers in both the public and private enterprise sectors, and that the amount employers are willing to expend on it is not insignificant. The survey was also pointed to possible differences between the two sectors in both the incidence and expenditure on training. However, the sample was much too small to explore whether there are any systematic differences between industries, by enterprise size or by the extent of exposure to global competition. A much larger sample would be needed for that, or a complete census of enterprises such as the one employed by MCIL in its triennial labour market survey.

28. The information the study team was able to collect from public and private TVET providers yielded sufficient up-to-date information to enable the calculation of unit costs of delivery. The results of this exercise are presented in Chapter 16.

29. Five unit cost measures were calculated:
    - Costs per course
    - Costs per student enrolled in the course
    - Costs per graduate
    - Costs per training hour
    - Costs per student training hour.

30. Unit cost estimates are made for each TVET provider for 2011. The assumptions made, and the steps taken in this exercise, are included in Annex 6.

31. A number of factors could be expected to be at play here:
    - unit costs could be varying systematically across fields of study and by level of training – with some fields by their nature requiring higher cost operations than others, and with higher levels of training requiring more expensive more resource-intensive activities;
    - unit costs could be subject to economies of scale, with unit costs tending to be lower the greater the class size and the higher the student staff ratio; and
    - differences in unit costs could reflect differences in the price of inputs, especially labour, in course delivery – with higher labour costs (teacher emoluments) driving unit costs higher.

32. The evidence from this study suggests that unit costs variations do not follow course and level differences, nor does it indicate that there are significant economies of scale at play in TVET delivery. What it does show is that differences in unit costs are most closely associated with differences in average annual teacher emoluments – the price of labour used in the production of TVET programs.

33. There are essentially three quite separate labour markets in which TVET teachers are employed – TVET teachers in NUS are employed under the same terms and conditions as other NUS academics, on the same pay scales, whilst those working in the private provider sector take home substantially lower salaries and receive fewer other emoluments. The differences appear so great that the two groups of workers can hardly be said to be competing for employment in the same market.

34. Teachers at APTC, on the other hand, are mostly employees of TAFE colleges in Australia and hence receive Australian pay and entitlements, including offshore allowances.

35. Calculation and comparison of unit costs of delivery are necessary but insufficient ingredients in the assessment of the internal efficiency of TVET provision. Further analysis is required to come to any definitive conclusions as to whether resources devoted to the sector are being effectively or wastefully deployed.

36. Assessment of the external efficiency of TVET requires the analysis of the outcomes from TVET programs – the employability of its graduates, particularly in occupations that use the skills they were trained in, the contribution graduates make to the economic and social development of the country, and so on. Graduate surveys and tracer studies are an essential source of information in this respect. Some such studies have been undertaken for TVET provider graduates, but not on a systematic and comprehensive scale. The conduct of surveys such as these was outside the scope of this study.

37. Part V of this report brings together the study's findings by identifying the key issues that have a bearing on the way in which the TVET sector in Samoa is financed, and policies that are available to address them.

38. Chapter 17 identifies the following issues as being significant to the financing of TVET
    - No clear sense of a TVET 'system'
        - There is a lack of clear Ministerial responsibility for TVET
        - There is no core terrain for TVET, only an upper part and a lower part

    - There are no TVET pathways between TVET providers
    - There is no unified funding model for TVET
- In public provision, a lack of clear identity
- Planning documents do not recognise TVET's clear role in developing middle-level skills
- Inadequate database for planning
- TVET courses on offer are conventional, mostly male-oriented and largely supply-driven
- Efficiency issues, both internal and external
- No obvious TVET strategy presented to development partners
- Assistance to the sector lacks cohesion

39. The data and analyses suggest several broad policy implications that would be worthy of debate and further investigation. The overarching objective should be to achieve an independent, integrated, competitive and effective TVET sector in Samoa. In achieving this objective changes in the financing of TVET – the focus of this study – are just one part, albeit a very important part, of reform. Other critical elements in the national debate about the future of TVET include its governance, structure and types of provision.

    - *A need to diversify sources of funding*. The funding of TVET in Samoa is heavily dependent on government and development partners. In addition to seeking greater effectiveness in the use of current resources, growing the TVET system will require more contributions from the other beneficiaries of TVET, namely young people and their families, and employers. .However, because course fees are already high for low-income families, some other forms of private contribution would need to be investigated if access and equity are to be improved, such as payments from post-graduation earnings. Employers are only likely to be willing to contribute more funds to training, if they can be assured that their views are heard and the courses are geared to meeting labour market needs.

    - *A need for funding mechanisms to reduce fragmentation and improve efficiency of resource use*. Samoa has quite a large number of different TVET elements and providers despite its small size. This fragmentation makes it hard to achieve economies of scale, improve infrastructure or provide attractive educational environments for teachers and students. The allocation of funds could be used to provide incentives for providers to merge and reduce overheads, thereby freeing up resources to modernize the types of programs provided. Funding allocations could also place a greater emphasis on programs that are able to demonstrate they are improving students' employability and meeting labour market needs.

    - *A need for better evidence to guide policy and practice*. The study has indentified many gaps and limitations in the financing data and research available to assist policymakers and practitioners make better decisions. The framework developed by this study could be used as the baseline for monitoring the financial performance of TVET in Samoa, the costs of provision, and the effectiveness of resource use, and for conducting cost-effectiveness analyses of proposed policy changes, and benchmarking Samoa against comparable countries. As part of this, more effective monitoring of the outcomes of TVET as well as more independent research on what works (by linking costs and effectiveness) are also needed.

PART I: INTRODUCTION

CHAPTER 1. PURPOSES OF THE STUDY

1.1 INTRODUCTION

This report provides a detailed analysis of the financing of Technical and Vocational Education and Training (TVET) in Samoa.

The report forms part of the study *Research into the Financing of TVET in the Pacific* initiated by the-then Australian Agency for International Development (AusAID). In April 2012 AusAID and then later the Australian Government Department of Foreign Affairs and Trade (DFAT contracted the Australian Council for Educational Research (ACER) to conduct the study. ACER led a consortium including Scope Global (formerly Austraining International) (which was responsible for logistics, in-country support and employment of national consultants) and specialist research consultants.

The research aimed to produce, in conjunction with host country governments and TVET stakeholders, a comprehensive empirical analysis of the existing systems for financing TVET in up to seven Pacific countries (Fiji, Kiribati, Papua New Guinea, Samoa, Solomon Islands, Tonga and Vanuatu), identify key financing issues within the region, and identify policies through which future financing for TVET could be made more efficient and effective at both national and regional levels.

The overall project ran from 2012 to 2014, with the seven country studies being conducted in two stages. The timing of the fieldwork in participating countries is outlined in Table 1.1. The Samoa country study forms part of Stage One fieldwork.

Table 1.1 Countries participating in the research

Stage One (fieldwork in 2012)	Stage Two (fieldwork in 2013)
Samoa	Fiji
Tonga	Kiribati
Vanuatu	Solomon Islands
Papua New Guinea (Phase 1)	Papua New Guinea (Phase 2)

The individual country studies are based on a common conceptual framework and research approach intended to facilitate synthesis and comparative analysis.

This report provides the Samoa country study. It initially comprised a draft report that was reviewed by the National Reference Group (NRG) for the study, the Research Steering Committee established by AusAID and later managed by the Australian Government Department of Foreign Affairs and Trade (DFAT), and external reviewers. The revised draft report was presented at a national forum held in Apia in June 2013 before being finalised.

1.2 RESEARCH OBJECTIVES

Developing vocational and technical skills and enhancing employability are strategic objectives in the Pacific Islands Forum's *Pacific Plan for Strengthening Regional Cooperation and Integration* (2007), Australia's *Port Moresby Declaration* (2008) and the Forum Education Ministers' *Pacific Education Development Framework* (2009).

Background research for the *Research Brief* developed by AusAID (2011) concluded that, to help achieve skills development and employability objectives, national governments, donors and other TVET stakeholders need a comprehensive understanding of public and private investment in TVET, taking into account the sources of funding, costs of services, size and patterns of expenditure, financing mechanisms, and outcomes delivered. Nevertheless, the research concluded there is a dearth of up-to-date information about these aspects of skill development in the Pacific.

The research is intended to help fill this gap by:

a) identifying the current public and private sources of capital and recurrent funding for TVET and the relevant expenditure from each source;
b) identifying where expenditure is directed, taking account of the participation of females and males, and through what distribution mechanisms;
c) identifying the TVET outcomes provided for the funds allocated, including a comparison of the costs of TVET training between different types of providers, fields and level of training, duration, mode of delivery and geographic location; and
d) assessing the strengths and weaknesses in different contexts of different financing mechanisms being used and identifying options for financing mechanisms that are more likely to ensure financially sustainable TVET systems.

The broad definition of TVET provided in the *Research Brief* for the purpose of the research is as follows:

> *Post-secondary education and training programs designed to develop vocational skills. Degree and higher level programs, and subjects delivered as part of general education by secondary schools, are not included in this definition.*

Chapter 2 of this report details how this definition was applied in the Samoan context to determine the scope of TVET to be included in the Samoan study.

The *Research Brief* asks the study to address at a minimum the following questions:

Sources of funding

- What are the current public and private sources of capital and recurrent funding for TVET?
- What is the relative contribution from each source in terms of the overall funding of TVET?
- What is the level of reliance on donor funding?
- What is the level of reliance on foreign private funding, and are there strategies in place to limit risks if there is a danger of funding being removed at short notice as investment decisions change?
- What non-financial inputs are provided for TVET, from what sources, and what is their estimated value?

Expenditure

- What is the overall level of public and private expenditure on TVET?
- What is the total government expenditure on TVET as a proportion of total government expenditure and what is the relative contribution of national and provincial governments?
- What is TVET's share of the education sector budget?
- To what extent is there a gap between budget allocation to TVET and expenditure?
- Where is expenditure directed, and through what allocative mechanisms?
- What proportion of expenditure on TVET could be defined as quality related expenditures?

Cost of TVET Services

- What is the most useful unit of analysis for assessing the costs of TVET services?
- What are the TVET services provided for the recurrent funds expended, and can they be quantified?
- What are the comparative costs of TVET between different types of providers?
- What proportions of total costs are costs of wages and salaries, materials/consumables, and infrastructure?
- What is the cost of capital?
- What areas offer the greatest potential for improved cost efficiency?

Financing Mechanisms

- What funding mechanisms are currently being used to finance or co-finance TVET?
- How efficient and effective are these different mechanisms? To what extent are they responsive to demand from industry, communities and individuals? To what extent are they being used to promote inclusion of groups at risk of labour market and social exclusion?
- How successful are these mechanisms in providing the country with a predictable and sustainable source of financing for skills development?
- What policy measures are in place to improve diversification and sustainability in funding mechanisms?
- Is the existing funding model sustainable if access to TVET is to be expanded?
- What changes would ensure more financially sustainable and demand-based national TVET systems?

This report addresses these questions for Samoa to the extent possible with the time and resources available.

1.3 STRUCTURE OF THE REPORT

The report is structured in five main parts. (The other country reports are using a similar structure.) Chapter 2 completes Part I by providing a detailed description of the research approach used in Samoa, including the data collection instruments that were developed. Part II (Country Background) contains Chapters 3-7 that outline the broad national context of Samoa.

In Part III (TVET in Context) Chapters 8 to 11 provide a detailed description of TVET institutions and activities in Samoa, and discuss access to educational opportunities, the contribution of TVET to economic developments, and developments and issues concerning the quality of TVET.

Part IV (The Financing of TVET) presents the main findings and analyses from the study. TVET funding and expenditure patterns and trends are presented and analysed in Chapters 12 and 14. The financial mechanisms that channel resources into and throughout the TVET sector are identified and analysed in Chapter 13. Chapter 15 details the study team's pilot survey on enterprise training and its funding, and in Chapter 16 unit costs of TVET delivery are estimated, and their use in evaluating the efficiency of TVET delivery is assessed.
In Part V (Issues and Policy Directions) the overall conclusions of the study are summarised, key issues identified, and policies outlined for consideration by the Government of Samoa, other TVET stakeholders, and development partners.

Further details on the study are provided in the annexes. Annexes 1-4 include the data collection templates developed for different aspects of the study. Annex 5 compares Ministry of Finance and NUS financial estimates. Annex 6 describes the methodology used for the unit cost estimates provided in Chapter 16, and includes further detail about the estimates. Annex 7 provides the classification and coding systems used in the data collection and recording.

The people and organisations involved in consultations during the fieldwork are listed in Annex 8, and the members of the National Reference Group for the study are provided in Annex 9.

CHAPTER 2. RESEARCH APPROACH

The *Research Brief* for this study of the financing of TVET in Samoa includes the systematic gathering and analysis of information under four broad headings:

- Sources of funding for TVET
- Expenditure patterns and trends in TVET
- Financial mechanisms for channeling funds to and facilitating expenditure on TVET
- Costs of TVET delivery

2.1 DEFINING TVET IN SAMOA

The first task was to determine the scope of TVET in Samoa. The broad definition provided in the *Research Brief* for the purpose of the research is as follows:

> *Post-secondary education and training programs designed to develop vocational skills. Degree and higher level programs, and subjects delivered as part of general education by secondary schools, are not included in this definition.*
>
> *The research will encompass the following formal and non-formal learning. Informal (non-structured) learning is excluded:*
>
> - *TVET at upper secondary school level (at and above Year 4) that is provided in specialist vocational secondary schools but not the provision of practical subjects within general education;*[1]
> - *Post-secondary non-tertiary TVET provided for school leavers in specialist vocational colleges/centres;*
> - *Post-secondary tertiary TVET up to Bachelor level programs;*
> - *Structured training for both the formal waged economy and informal labour market;*
> - *Structured training for pre-employment and for existing workers;*
> - *Structured training provided on- and off-the-job, including apprenticeships;*
> - *Enterprise-based, community-based and institution-based TVET;*
> - *Structured training funded from public, private, community or external sources; and*
> - *Structured training provided under the auspices of the Ministries of Education, Labour, Youth Development, Maritime, Fisheries and Tourism and Hospitality.*

In refining this definition for the purposes of the Samoa study, a matrix has been developed that identifies TVET programs by (a) the skill categories and levels they seek to develop and (b) by the institutions that offer them. Skill categories and levels are in turn identified according to the qualification levels they are pitched at, and the occupations to which they are directed. The qualification levels are broadly based and are similar to those of the Samoa Qualifications Framework (SQF), and occupations are classified according to the International Standard Classification of Occupations, (ISCO) 2008 version.

Institutions identified as providing structured TVET programs are classified according to whether they are public, private or regional TVET providers, other Government of Samoa line ministries and agencies that offer TVET-type programs, and employers in the state-owned enterprise (SOE) and private corporate sectors.[2] The matrix is shown in Figure 2.1. The scope of the TVET sector in Samoa as used in this study is depicted in green.

[1] In the Pacific these practical subjects within the general secondary curriculum include Design and Technology, Agricultural Science, Food & Textiles, Visual Arts, Fine Arts, Computer Studies.

[2] Exclusions – police and fire services, nursing and school teacher training, and unstructured training conducted in the informal, non-wage- economy.

Table 2.1 The skills/employment/training matrix for Samoa

level of skills training (qualifications framework)		occupational skill category [ISCO 08]		providers			
				training institutions			GoS ministries and agencies, state-owned enterprises and corporate sector employers
				public	private	regional	
10	doctoral	1/2	managers/professionals	NUS higher education programs	Oceania University of Medicine Samoa	USP Alafua School of Agriculture and Food Science	
9	masters						
8	post-graduate (cert/dip)						
7	bachelor degree						
6	advanced diploma	3	technicians and associate professionals		theological colleges		
5	diploma			TVET programs in NUS *School of Engineering *School of Maritime Studies * School of Business and General Studies *Oloamanu Centre			
3/4	trade certificate	4	clerical support workers		*Don Bosco TC *LPTC *UTVC *TIAS	APTC	on and off-the job training
		5	service and sales workers				MoA workshops and short courses
		6	skilled agricultural, forestry and fishery workers				apprenticeships
		7	craft and related trades workers				
1/2	semi-skilled/operative	4	clerical support workers	technical and vocational subjects offered in general secondary school curricula		USP Alafua Centre for Community and Continuing Education	on and off-the job training
		5	service and sales workers				
		8	plant and machine operators, and assemblers				
	basic manual	9	elementary occupations	primary school			on-the-job training

advanced skills/professional and managerial occupations/higher education

middle level skills/ trade and technician occupations/TVET (the focus of the study)

elementary employment skills/ unskilled and semi-skilled occupations/ general secondary and primary schools

no training provided at this level

The parameters of the sector are therefore defined by the following:

TVET qualification levels
Certificate levels 1, 2, 3 and 4, Diploma level 5 and Advanced Diploma level 6.[3]

ISCO-08 major (first digit) occupational groups serviced by TVET

1. technicians and associate professionals
2. clerical support workers
3. service and sales workers
4. skilled agricultural, forestry and fishery workers
5. craft and related trades workers
6. plant and machine operators, and assemblers

[3] SQF is a work-in-progress and is underpinned by SQA's quality assurance system. Provider qualifications can only be registered on the SQF if they meet all the qualification registration quality standards and criteria. For this reason in this study qualifications are identified as broad levels, rather than specifically designated SQA levels.

TVET provision and regulation

Public provider

National University of Samoa (NUS):
School of Engineering (Faculty of Applied Science)
School of Maritime Studies (Faculty of Applied Science)
School of Business and General Studies[4]
Oloamanu Centre for Professional Studies and Continuing Education

Private providers

Don Bosco
Laumua o Punaoa Technical & Vocational Centre (LPTC)
Uesiliana Technical & Vocational Centre (UTVC)
Tesese Institute of Administrative Studies (TIAS)

Regional providers

Australia-Pacific Technical College (APTC)
University of the South Pacific (USP) Alafua Centre for Community and Continuing Education (CCCE)

Other structured training providers

Other government ministries – primarily the Ministry of Agriculture
Samoa Umbrella for Non-Government Organisations (SUNGO) and Samoa Chamber of Commerce and the Public Service Commission (for the Samoa In-Country Training Program)
Employers in SOE and private corporate sectors

TVET regulators

Samoa Qualifications Authority (SQA)
Ministry of Commerce, Industry and Labour (MCIL) – Administration of Apprenticeship Scheme and Employment Services

These two agencies are included because they play a key role in the regulation of and support for the TVET sector. SQA has an overview and quality assurance function for the whole of the post-school education and training (PSET) sector, of which the TVET sector forms a part, alongside the higher education sector; the development of the SQF; the registration of PSET providers and so on. The Apprenticeship and Employment Services office in MCIL is responsible for the regulation of the apprenticeship program, and for the provision of labour market information to TVET providers, students and graduates.

2.2 DATA REQUIREMENTS

Analysis of financial flows and mechanisms, the estimation of unit costs of TVET provision and assessment of TVET program outcomes require a solid base of comprehensive, reliable, current and frequently up-dated information. The key data identified for the study comprised the following fields and sub-fields.

[4] This entity no longer exists in the NUS, its TVET programs (carried forward from the previous Institute of Technology (IoT) are dispersed amongst the faculties of Business and Entrepreneurship, Arts and Science. However, at least until the 2012-13 Ministry of Finance (MoF) annual budget appropriations, it has continued to exist as an NUS output. For that important reason it is retained for this study.

TVET program details

Program offerings

course levels, fields, duration etc
fees and student assistance
maximum student contact hours

Student numbers

enrolments, new and total
graduates (successful completions)
student training hours
student outcomes (tracer data)

Staffing

staff numbers and categories
equivalent full-time staff
teaching loads, etc

Funding sources

GoS annual budget allocations - MoF
Targeted ODA grants
- Australia's aid program
- NZAID
- others

Student fees
Sale of products and services
Industry/employer contributions
Churches and community
Other sources

Expenditure categories – planned and actual

Recurrent expenditure
- Personnel – staff salaries and other emoluments
- Direct operating expenses – utilities, teaching materials and consumables, etc
- Overhead expenses – e.g. pro-rata share of general institutional costs of administration

Development expenditure – staff development, curriculum development, etc
Capital programs – civil works, equipment, etc

Scholarship and other student assistance programs

Scholarships and other forms of student assistance (such as living allowances, rent assistance, and subsidised accommodation) are transfer payments, and hence are both an expenditure item and a source of income).

2.3 AVAILABLE INFORMATION SOURCES[5]

The team initially conducted an extensive review of the data that were available for Samoa. This review included desk analysis and discussion with key organisations during the facilitation visit to Samoa in June 2012. The main purpose of this initial review was to minimise the data burden on TVET stakeholders by making use of existing data and confining any new data collections to filling data gaps.

[5] A full list of all documents and web-based material cited is contained in the References.

The following list summarises the main sources of available data that were identified.

Published and unpublished documents of GoS and its ministries and agencies[6]

Planning documents

- Government of Samoa, Strategy for the Development of Samoa (SDS) 2008-2012, and its successor SDS 2012-16.
- Ministry of Education, Sport and Culture (MESC) *Strategic Policies and Plan, 2006-2015*
- Samoa Qualifications Authority (SQA) Post-Secondary Education and Training Strategic Plan, 2008-2016
- Ministry of Commerce, Industry and Labour (MCIL), Apprenticeship Program: Strategic Policy Framework, 2012
- National University of Samoa (NUS), *Strategic Plan, 2010-2020*
- GoS Education Sector Plan Working Group, *Education Sector Plan, July 2012-June 2016*, Version 12, April 2012
- Other corporate plans, annual plans and budgets at Ministry, department and agency levels

These documents contain a great deal of valuable material, However, in terms of the needs of this study, none of these strategic, medium-term, plans contain any TVET sector enrolment, graduation or staffing statistics or projections, and none of them are costed. It is our understanding that these plans have yet to be translated into medium-term expenditure frameworks (MTEF) or costed annual operational plans.[7]

GoS Budget Documents

- GoS Legislative Assembly of Samoa, Approved Estimates of Receipts and Payments of the Government of Samoa, for the (coming) Financial Year

These documents provide detailed information of the Ministry of Finance (MoF) administered annual budget appropriations to line ministries such as MCIL and MESC and to statutory authorities such as NUS and SQA. The output-based budgeting approach adopted by the MoF enables the allocations within the annual NUS budget appropriation to its TVET operations to be identified, and with specific TVET directed activities within SQA and MCIL to be similarly pinpointed. They are of necessity only estimates, however, of funding and expenditures for the coming year, and as such may only approximate actual revenue received and actual expenditures incurred during that period.

Annual Reports

Annual reports have the advantage of being able to record actual, as opposed to estimated numbers. Their disadvantage is that they are sometimes delayed in publication, and therefore are out-of-date when they become available. An example of this is the MoF *Public Accounts*, which details actual revenues and expenditures of government line ministries and agencies. The latest published is for 2007-08, but this is not yet available on the MoF website.

The most useful annual reports for this study are from the two statutory authorities, the latest being:

- SQA, Post School Education and Training Statistical Bulletin, 2011, March 2012

This contains up-to-date and reliable statistics on TVET providers, their enrolments and graduate numbers, number of teachers. Its financial information consists of details of course

[6] Available in hardcopy or as pdf files downloadable from GoS websites.
[7] Progress is, however, underway to develop corporate plans, three-year forward estimates, and the annual plans and budgets.

fees, and a table showing broad trends in government PSET expenditure allocations over the period 2007-08 to 20011-12

- NUS, Annual Accounts 2010-2011, October 2011

Detailed financial statements of the university as a state-owned enterprise, that allow a partial identification of revenue and expenditure associated with its TVET operations

Commissioned reports

Two reports commissioned by AusAID and submitted by Charles Kendall and Partners in July 2012, are relevant:

- Assessment of the Education Sector's Public Financial Management Systems, Samoa Final Report, and
- Assessment of the Education Sector's Public Procurement Systems Final Report

They provide assessments of the financial management and procurement capacity of education sector agencies – MESC, SQA and NUS, preparatory to the introduction of a sector-wide approach to the funding of education and training. This former document is particularly of value to this study for the insights it provides into the financial mechanisms that impact upon the resourcing of TVET in Samoa.

Another study, also funded by AusAID and delivered in 2012, was under its Technical and Vocational Education and Training Project (Key Result Area #4 – Financial Sustainability):

- SQA, Post School Education and Training Expenditure Review, Final Report, submitted by Schuster and Annandale, July 2012

Its major task was to survey all PSET providers in Samoa, to collect information about the funding, expenditures and financial mechanisms of these institutions. Its brief was thus similar to this one, and hence its findings were of considerable use to our study. However, it had a somewhat different scope to our study – (a) it focused on the broader PSET and, as a result, did not distinguish between the higher education and TVET operations within NUS, (b) it did not include any information on APTC, one of the largest and well-funded providers of TVET in Samoa, and (c) it did not collect information regarding expenditures by enterprises on the training of their employees.

Published and unpublished documents of development partners

Australian Government

- AusAID Samoa: Annual Program Performance Report, 2011, June 2012

At the time of writing AusAID had three programs that provided assistance to the TVET sector, and was planning a fourth.

TVET Program, 2011 to 2014

Two documents provide information regarding this program

- AusAID, Proposed Road Map for Australian Support to TVET under the Samoa-Australia Partnership for Development, by Kaye Schofield, (unpublished) March 2011
- SQA, Final – TVET Program Implementation Plan and Budget, 2011-2012, Annex 2 Consolidated Budget, (unpublished) November 2011

The latter includes a detailed budget proposal for the first year of the TVET Program.[8]

APTC Samoa campus operations

Detailed course offering are provided on the APTC website, but no student staffing or financial data for this important contribution to the Samoan TVET sector are published.[9]

Joint Australia-NZ Samoa In Country Training Program (SICTP)

- Samoa In Country Training Program, Strategic Framework 2009-2011

The SICTP website provides details of the program's history, organization, and current tenders, but no details about enrolments or resourcing.

Joint Australia-NZ Samoa Education Sector Support Program

A document that outlines the development partners' plans:

- GoS, Education Sector Plan Working Group, Education Sector Plan, July 2012-June 2016, Version 12, April 2012

Other development partners

Two other documents provide helpful information

- The New Zealand Aid Programme - Ministry of Foreign Affairs and Trade, IATI data (unpublished) - May 2012
- World Bank (IDA/IFC) Country Partnership Strategy for the Independent State of Samoa, 2012-2016, March 2012

Secondary source material

The team did not uncover any secondary source material specifically related to the focus of Part IV of this study that provided additional information regarding the financing of TVET in Samoa. However there are other secondary sources used in other parts of the report.[10]

[8] It is with funds available under this program that SQA commissioned the *PSET Expenditure Review.*

[9] In order to minimise the data burden on APTC campuses that are operating in individual countries, and to ensure consistency of data provision, the study team agreed with APTC headquarters in Fiji that data relating to APTC's operations in each country would be provided centrally.

[10] All documents and web-based material cited in this report are included in the References.

Table 2.2 Summary of available documentary source material on TVET

data item	TVET provision								industry/ employers	regulators	
	NUS		private		regional		other training providers				
	TVET programs	Oloamanu Centre	Don Bosco	other private colleges	APTC	USP Alafua CCCE	other gov't agencies	SUNGO and SCoC		SQA	MCIL app and emp. services
published official documents											
strategic plans									not applicable		
annual/operational plans									not applicable		
MTEF									not applicable		
annual budget allocations									not applicable		
annual reports									not applicable		
websites											
other published documents											
donor strategies and plans									not applicable		
donor annual reports									not applicable		
commissioned reports											

current , with useable TVET and financial statistics

current , with useable TVET statistics, but without financial statistics

out-of-date or incomplete, but with useable TVET and financial statistics

out-of-date or incomplete, with limited TVET statistics and no financial data

no reports available

How useful are these information sources to the study?

As is evident above, there is a remarkably large amount of published and unpublished material available that directly or indirectly relates to the TVET sector, and much of it is current. However, a good deal of it is short on specifics, regarding detailed statistical information about enrolments in, graduates from, or the staffing and resourcing of, the TVET sector as we have defined it, whether that information be for the current state of the sector, past trends or future projections.

Table 2.2 attempts to summarise the situation across the sector, and across the categories of available material. The summary refers to the availability of data in terms of the study's particular needs. It does not relate to other aspects of the information included in the documents and reports concerned What is evident is that the best sources of materials for this study's purposes were MoF budget estimates, and SQA and NUS annual reports. One-off commissioned reports have also been useful, but for much of the sector there remain significant gaps.

2.4 APPROACH TO FILLING INFORMATION GAPS

As well as reviewing all available information sources, the study team pursued a three-pronged approach to information gathering:

a) The team sought to directly elicit information from TVET providers about their courses, students and staffing and about their finances. In particular it approached ***NUS***, the ***APTC*** through its central office in Nadi, and a number of ***private providers.*** The purpose of the approach to NUS has been to obtain detailed information that specifically related to its TVET programs and operations, information that is not readily distinguishable from NUS's reports or SQA's statistical bulletins. The purpose of the approach to private TVET providers was to supplement and attempt to fill some of the gaps in the information provided to the PSET Expenditure Review that SQA commissioned and AusAID funded. APTC central office was also approached, to

provide inter alia a detailed breakdown information of student, staffing and financing of its Samoan campus.

Customised data collection templates were prepared upon which to record the data being sought. Copies of these are contained in Annexes 1 to 4. In all cases authority to proceed was sought and obtained from the management of the respective institutions.

b) A pilot survey was designed and conducted that sought to elicit information from a small selection of employers in the SOE and private corporate sectors, regarding the nature and amount of training they provide or sponsor for their employees, particularly those employed in the range of occupations and with qualifications within the scope of TVET. This survey was discussed with the Samoa Bureau of Statistics (SBS) and the MCIL; it was deemed useful because it supplements the MCIL triennial *Labour Market Survey of Private Sector Employees*, (LMS), the latest of which was conducted in 2010, and the next is due in 2013. The LMS is an extremely useful information source, but it does not explicitly collect information on the enterprise training and budgets. If this pilot is successful it is hoped that the MCIL may be able to draw on it to modify its LMS survey instrument in order to collect such information.

   Details of how the survey was conducted, the results it produced and the lessons that were learnt from it, are contained in Chapter 15.

c) The team conducted an extensive series of meetings and interviews with as many stakeholders and their representatives as time permitted, in order to provide its members with as clear an understanding of the TVET sector, how it is conducted and resourced, as possible. In this aspect of the study the team was greatly helped by the National Reference Group (NRG) that was established to provide guidance and support to the team during its information collecting mission. Details of the NRG, its composition, functions and meetings, are contained in Annex 9, and comprehensive lists of people consulted and institutions visited are contained in Annex 8.

2.5 INDICATIVE QUALITY OF THE INFORMATION COLLECTED

Taking all relevant information from available published and unpublished sources, and combining it with the information it obtained through its special requests for data from providers and its enterprise survey, the study team put together as comprehensive a body of information on the financing of TVET as its limited time and resources permitted. The results are analysed in Part IV of this report, and their implications for the major stakeholders are canvassed in Part V.

The data compiled and collected by the team are part of the Data Framework developed for the study. This is intended to provide participating countries, TVET stakeholders and development partners with a framework they can use for the ongoing monitoring of TVET financing and costs data over time. It is also intended to help identify priorities for work that is needed to fill important data gaps, and develop the capacity of countries to collect and analyse such data on an ongoing basis.

In doing so, the team was able to make an assessment (albeit a subjective one) of the quality of the information it compiled and gathered, in terms of its reliability, coverage, currency and periodicity in terms of the study's particular needs. The assessment does not relate to other aspects of the information included in the documents and reports concerned.
Its assessment is summarised in Tables 2.3 and 2.4.

Table 2.3 Indicative quality of information on TVET sector program offerings, from all sources at the time of the fieldwork

data item	TVET provision								industry/ employers	regulators	
	NUS		private		regional		other training providers				
	TVET programs	Oloamanu Centre	Don Bosco	other private colleges	APTC	USP Alafua CCCE	other gov't agencies	SUNGO and SCoC		SQA	MCIL app and emp. services
Program offerings											
course levels, fields, etc										not applicable	not applicable
fees and student assistance info										not applicable	not applicable
student contact hours										not applicable	not applicable
Student numbers											
enrolments										not applicable	not applicable
graduates										not applicable	not applicable
student training hours										not applicable	not applicable
student outcomes (tracer data)										not applicable	not applicable
Staffing											
staff numbers and categories											
teaching loads, etc										not applicable	not applicable

good, reliable, comprehensive, up-to-date
fair- but not current and/or complete
patchy, not complete
limited , nothing systematic
no relevant data available

The value of this sort of exercise is that it identifies, on the one hand, where good, reliable, comprehensive, up-to-date and frequently collected data exist, and on the other, where there remain significant gaps. In many instances, in the case of the latter, this is because the information is just not recorded in the first place. The reasons given for this vary, but often it is either because of a lack of requirements for reporting, or a lack of resources.

Table 2.3 shows that in the assessment of the team the quality of the data it was able to gather relating to TVET programs, student and staff statistics, and so on are generally of good quality, especially for the providers of structured training programs. The biggest gaps were amongst some of the smaller providers of continuing education and training programs, and amongst employers. Statistics relating to staff and student hours of training, across the board, were patchy. These are statistics commonly collected in the TVET sector internationally, that providers in Samoa are unaccustomed to providing.

Quality assessments of financial data in terms of the study's brief are summarised in Table 2.4. Again, the overall quality for the main TVET stakeholders is good, although it is generally better for annual budget estimates than it is for actual funding and expenditures, and it is most limited for the small providers and for enterprises.

Table 2.4 Indicative quality of TVET sector financial data, from all sources at the time of the fieldwork

data item	TVET provision								industry/ employers	regulators	
	NUS		private		regional		other training providers				
	TVET programs	Oloamanu Centre	Don Bosco	other private colleges	APTC	USP Alafua CCCE	other gov't agencies	SUNGO and SCoC		SQA	MCIL app and emp. services
government budget allocations											
recurrent			not applicable	not applicable	not applicable	not applicable		not applicable	not applicable		
development					not applicable	not applicable		not applicable	not applicable		
capital					not applicable	not applicable		not applicable	not applicable		
other revenue sources											
AusAID direct support			not applicable	not applicable		not applicable			not applicable		
other ODA direct support					not applicable				not applicable		
student fees										not applicable	not applicable
sale of services											
industry contributions											
other funding sources										not applicable	not applicable
Total funding											
actual expenditure											
recurrent											
personnel											
other recurrent											
development programs											
capital w orks											
Total expenditure											
student assistance										not applicable	not applicable

good, reliable, comprehensive, up-to-date
fair- but not current and/or complete
patchy, not complete
nothing systematic
no data available

A key focus of this study is to assist with developing capacity for TVET financial data collection and use. This chapter has identified a number of gaps and limitations in the available data in Samoa. Our study has been able to go some way to filling some of these gaps, albeit in a limited and one-off way given the time limitations.

In Part V the salient issues that have arisen in the course of investigating the financing of TVET in Samoa are identified and discussed, and policy directions that are open to the GoS, sector stakeholders and development partners, are canvassed.

Needless to say, the financing of TVET, in any country, does not occur in a vacuum. To appreciate its scope and potential, and its limitations, its investigation must be grounded in the background of the country, and conducted in the context in which TVET is set. It is to these considerations – background and context – that Parts II and III of this report first turn.

PART II: COUNTRY BACKGROUND

CHAPTER 3. GOVERNMENT, CULTURE, RELIGION AND GEOGRAPHY

For Samoans, it is difficult to separate these four elements. The government and administration of the country spring from its culture and religion and these in turn, and in part, reflect the country's geography, its size and location.

3.1 GOVERNMENT AND ADMINISTRATION

Samoa was the first Polynesian nation to re-establish independence in the 20th century, under the name 'Western Samoa', in 1962. In 2012, Samoa celebrated 50 years of independence from New Zealand. The Constitution of Samoa, established in 1960, recognises the separation of powers (legislature, judiciary and executive) and blends traditional and democratic processes. The Constitution provides for: a Head of State; a Prime Minister and Cabinet of Ministers; and a Legislative Assembly.

The system of government is a stable, parliamentary democracy in the Westminster style with a unicameral legislative assembly consisting of 49 members, 47 of who are *matai* (chiefly titleholders) elected by citizens aged 21 years and over, and 2 of whom represent the part-Samoan and non-Samoan population. The Prime Minister selects 12 other parliamentarians to form a Cabinet. General elections are held every five years. The Human Rights Protection Party (HRPP) has been in power for more 30 years.

Universal suffrage was introduced with the 1991 elections. Before that, all but two of the seats could be voted for solely by *matai* (chiefs). The next general election will be held in March 2016. The Head of State was re-elected in July 2012.

Samoa is an active member of the Pacific Islands Forum, the Secretariat of the Pacific Community, and the Secretariat of the Pacific Regional Environment Program , which is based in Samoa. Samoa is a member of the Commonwealth and became the 155th member of the World Trade Organization in May 2012.

3.2 RELIGION AND CULTURE

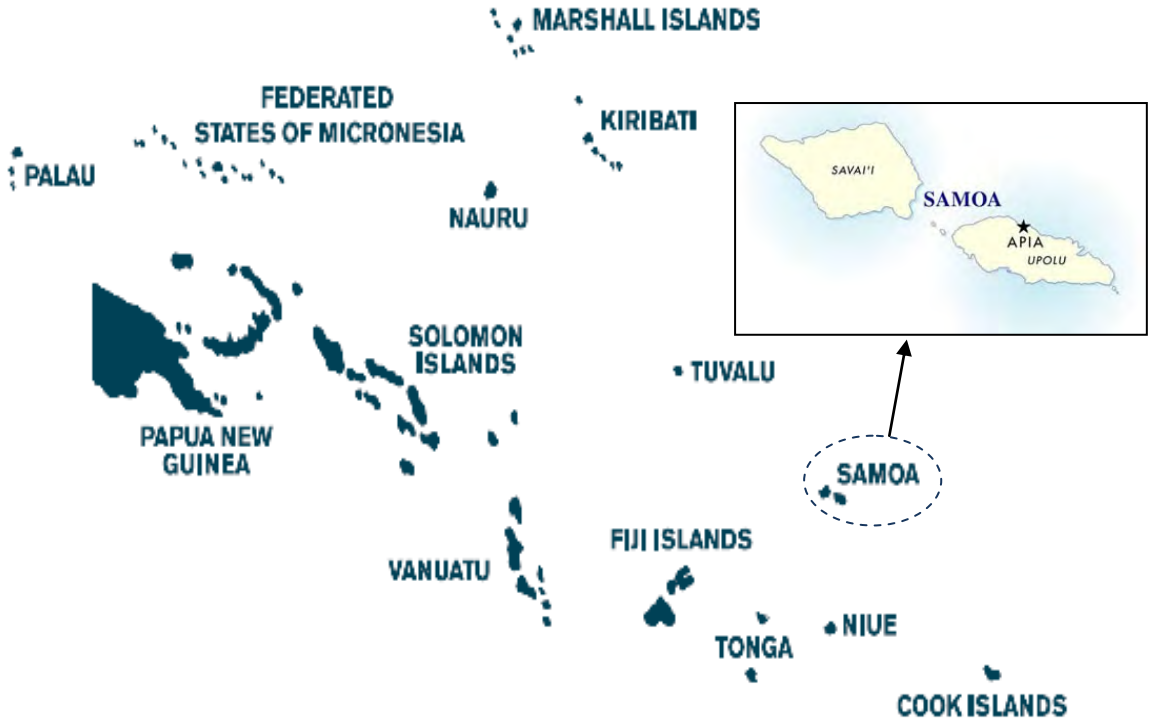
Religion plays an integral part in Samoan culture. Samoa has a distinctive identity, characterised by the overriding influence of the extended family. This is reflected, as in most Polynesian societies, in community and societal structures. The *faaSamoa*, which denotes the Samoan way of life, is dominant in managing all aspects of village life, particularly in the rural areas. In terms of religious denomination, the majority are Christian, primarily from the Congregational Christian and Methodist Churches. The latest Census statistics show that across all religious denominations, the most common are: Congregational Christian Church; Catholic; Methodist and Latter Day Saints (SBS 2012).

The *aiga potopoto* (extended family) is headed by a *Matai* or chief who is appointed by family consensus. The status of Matai is held by 8.9 per cent of the population (SBS 2012). The *Matai* can either be a male or a female although in practice most are males. The *Matai* form the central basis of the village administration. The legal system of Samoa recognizes the role of the *Matai* in keeping law and order in the rural areas and many disputes are handled by traditional or village Law. The *Matai* is responsible for maintaining family unit and prestige, administration of family land and other assets, settling disputes and representing the family on the village *fono* (council). In return for this leadership the Matai is rendered services or *tautua* by the family members.

3.3 GEOGRAPHY

Samoa is a Polynesian Pacific island country comprised of ten islands, two relatively large islands; Upolu and Savaii, comprising 96 % of the total land area, and eight smaller islands of which three are inhabited. The total land area is 2934 square kilometres; approximately 20% of the land area is arable and less than 37% of the land area is forested. The Exclusive Economic Zone is the smallest in the Pacific at 98,500 km2.

Figure 3.1 Geographic map of Samoa



The land is predominately volcanic and not easily cultivated. The interior is rugged with few flat areas so most villages are situated along the coast. Being located near the equator between longitudes 168° and 173° degrees West and between latitudes 13° and 15° degrees South of the equator, it has a tropical climate with an average temperature of 26.5° degrees and an annual rainfall of around 2880 mm on average. The rainy season extends from November to April.

CHAPTER 4. DEMOGRAPHY

The 2011 Census counts the population of Samoa at 187,820. The vast majority, 97 per cent, is of Samoan nationality and 91 per cent identify Samoan as their first language (SBS 2012). More than 38 per cent of the population are under 14 years of age and the median age is 20.3. The relatively youthful population is a reflection of its high fertility, emigration and increasing life expectancy. The share of the population under the age of 24 has reduced over the last three decades from 67 per cent in 1981 to 57 per cent in 2011 (Table 4.1).

Table 4.1 Age distribution of the population, 1981 to 2011

	1981	1991	2001	2011
Pop. ('000s)	156.3	161.3	176.7	187.8
Decadal growth rate (%)	6.6	3.2	9.6	6.3
Age bracket				
Under 15	44.3	40.6	40.7	38.3
15-24	23.0	22.2	18.1	18.4
25-34	10.6	13.8	14.4	12.9
35-44	7.8	8.5	10.9	11.4
45-54	6.5	6.3	6.8	8.7
55-64	4.4	4.7	4.6	5.2
65+	3.0	4.0	4.6	5.0

Source: SBS (2012), *Census of Population and Housing, 2011.*

There are approximately 67 people per square kilometre (SBS 2012). The majority of the population – 76 per cent – live on the island of Upolu, with around 20 per cent living in the capital city of Apia. The remaining and relatively larger shares of the population are located in northwest Upolu (33%), areas outside urban and northwest Upolu (24%) and the island of Savai'i (24%) in small coastal villages. The North West Upolu region, in particular, has grown as a share of the total population over the last three decades.

The estimated annual population growth rate is less than 1 per cent which, due to considerable emigration, is lower than most other Pacific Island Countries. The World Bank estimates that the net migration level[11] for Samoa over the five year period 2007-2011 was -15,738 (Table 4.2). Emigrants out of Samoa are typically people in the working age group with a greater number of males than females travelling overseas across all age groups. Additionally, there is a high level of internal migration within the different regions of Samoa and between the two islands (SBS 2012).

Table 4.2 Net migration levels, 1960 to 2010

	1960	1970	1980	1990	2000	2010
Net migration levels	-1,348	-5,054	-15,147	-16,402	-14,970	-15,738

Source: World Bank*, World Development Indicators, 2011*.

[11] Net migration is the net total of migrants during the period, that is, the total number of immigrants less the annual number of emigrants, including both citizens and non-citizens.

CHAPTER 5. LANGUAGE, LITERACY AND EDUCATION

5.1 LANGUAGE AND LITERACY

The official languages of Samoa, and official languages of school instruction, are Samoan and English. Students are taught in Samoan for the first six years, with English introduced orally in the third year. In the seventh and eighth years, instruction is in English.

The official figures for Samoa's literacy rate vary depending on the publication source, but it is usually recorded in the 90 percentile, which is high for a developing context. The 2011 Census of Population and Housing shows a literacy rate of 97.9% for persons aged 15-24 years old. The rate is slightly higher for females (98.8%) than males (97.2%).

Despite the high literacy levels reported, lacking literacy and numeracy skills remain constraints to participation in TVET in Samoa, particularly as the system has high academic entry requirements for post-secondary studies and few alternative or vocational pathways available.

5.2 THE EDUCATION SYSTEM

There are four levels within the education sector in Samoa:

- Early childhood education (non-compulsory, ages 3-4) is privately offered by private individuals, church groups and community-based organisations. It is administered by the National Council of Early Childhood Education of Samoa;
- Primary education (compulsory, ages 5-13, Years 1-8) is funded predominantly through grants and tuition fees. It is offered by 142 government schools, 14 mission schools and 7 private schools (MESC 2011). The joint Australia-NZ supported *School Fees Grant Scheme* pays grants to government and mission primary schools in Samoa on an annual basis. The grants are used to cover school fees;
- Secondary and college education (non-compulsory, ages 14-18) is funded predominantly through grants and tuition fees. It is offered by 24 government schools, 11 mission schools and 1 private school (MESC 2011).[12] MESC appoints and pays the salaries of principals and teachers, and distributes stationary, teacher resources and curriculum materials to schools. Parents and communities are expected to fund all other operations by way of school fundraising and revenues from school fees; and
- Post school education and training (selection-based, ages 18 and over).

Key education outcomes

The key outcomes from the Samoan school education system are:

- There were 57,078 students enrolled in primary and secondary education in 2010; 40,809 (71.5%) at primary level and 16,269 (28.5%) at secondary level;
- School participation rates were 98 per cent at the compulsory primary level and 59 per cent at the non-compulsory secondary level;
- Secondary school participation rates are higher for females (66%) than males (52%);
- The apparent retention rate from Years 9-12 is 73 per cent and 46 per cent from Year 9-13 as many students only choose to take Year 13 as a pathway into post-secondary studies; and

[12] Building on existing programmes in the primary education sector, many secondary school students in Samoa will soon receive free secondary education in a joint Samoa-New Zealand programme.

- The student teacher ratios have largely remained static over the last five years at 30.1 for primary schools and 20.3 for secondary schools.

Table 5.1 Primary and secondary schooling, 2006 to 2010

	2006	2007	2008	2009	2010
Enrolments	**54,635**	**54,670**	**54,699**	**55,092**	**57,078**
Primary	39,520	39,468	39,376	39,379	40,809
Secondary	15,115	15,202	15,323	15,713	16,269
Year 13 (% of secondary)	11.6	10.9	10.8	10.6	11.4
School participation (15-19 years)	**45**	**45**	**53**	**57**	**59**
Males (15-19 years)	41	42	49	53	52
Females (15-19 years)	48	49	57	61	66
Apparent retention rate					
Year 1 to Year 8	85	85	81	81	83
Year 9 to Year 12	78	79	73	73	73
Year 9 to Year 13	47	44	45	43	46
Student to teacher ratios					
Primary	32.5	32.1	31.3	30.9	30.1
Secondary	20.7	20.9	19.6	20.3	20.3

Source: Ministry of Education, Sports and Culture, *Statistical Digest* 2010.

Post-school education and training

Post-school education and training (PSET), as distinct from post-compulsory education, is the term used to describe all education and training activities which sit outside and beyond the formal school systems in Samoa. This encompasses:

- TVET, including TVET teacher training and a trades apprenticeship scheme;
- Higher education, including school teacher education;
- Professional and continuing education; and
- Non-formal learning.

Samoa's only public provider of post-school TVET is the National University of Samoa (NUS). All other providers are private, mainly supported by Church organisations, such as the Don Bosco Technical Centre (Catholic Church) and the Uesiliana Technical Training Centre and Lauma o Punaoa Technical Creative Centre (Methodist Church). There are also a small number of private TVET providers offering short courses in business and administrative studies such as the Tesese Institute of Administrative Studies. The major parameters of the TVET sector are outlined in Chapter 8.

The main public provider of higher education is the National University of Samoa (NUS). The NUS is a statutory body and state-owned enterprise governed by its own council which consists of members representing a cross-section of stakeholders. It provides higher education programs at the undergraduate and postgraduate levels, in addition to foundation level and preparatory programs. The University of the South Pacific (USP) also offers degree and postgraduate studies in arts, science, law, and commerce by distance and flexible learning as well as agriculture and continuing education in the face to face mode.

Non-formal learning is provided by various non-government organisations (NGOs), local not-for-profit organisations and government ministries. Established in 1997, SUNGO is the Umbrella Organisation for Non-Government Organisations and the national body that represents and coordinates training for NGOs. Most of this training is funded by donors and has to comply with donor requirements. SUNGO has more than 110 member organisations and has its own pool of trainers who provide training to rural community organisations.

CHAPTER 6. ECONOMY AND THE LABOUR FORCE

6.1 STAGE OF ECONOMIC DEVELOPMENT

An open, agriculturally-based economy, Samoa operates with a narrow resource, export and tax base. A persistent and sizable trade deficit renders it highly dependent on remittances, foreign aid and tourism to service its annual budget (Government of Samoa 2012). Samoa will change status from 'least developed country' to 'developing country' in January 2014. Although this is a positive indication of Samoa's economic and social development, it also raises questions about how it can maintain the level of donor support in areas such as health and education.

Samoa has one of the most stable governments in the region which provides an important platform for its economic development. The government is supported by Official Development Assistance (ODA) from donors including Australia, New Zeland, Japan, China and the EU. ODA comprises around 15 per cent of GDP each year (NZ MFAT 2012).

Table 6.1 Economic indicators, 2008 to 2012

	2008	2009	2010	2011	2012
GDP (US$m) (current prices):	502	570	620	630	687
GDP PPP (US$m)	1,078	1,031	1,045	1,090	1,119
GDP per capita (US$):	2,779	3,143	3,405	3,451	3,748
GDP per capita PPP (US$)	5,965	5,682	5,740	5,965	6,105
Real GDP growth (% change y/y):	4.3	-5.4	0.2	2.1	1.4
Current account balance (US$m):	-33	-18	-50	-95	-98
Current account balance (% GDP):	-6.5	-3.2	-8.1	-15.1	-14.2
Goods and services exports (% GDP):	34.5	30.5	31.3	Na	Na
Inflation (% change y/y):	6.3	14.6	-0.2	2.9	7.5

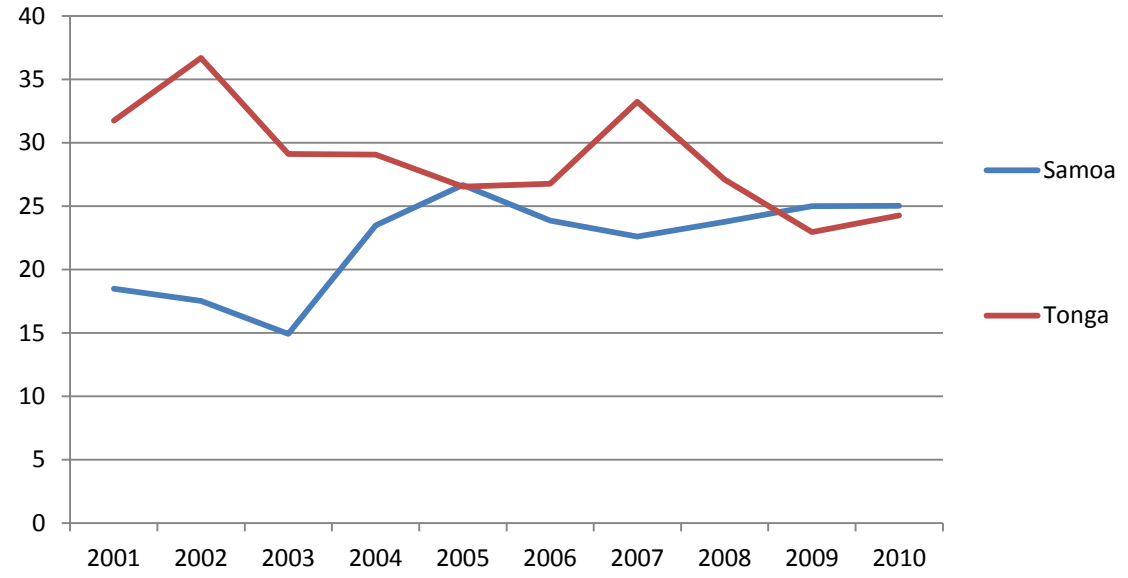
Source: DFAT (2012), *Samoa Factsheet*.

Real GDP growth has ranged between -5.4 and 4.3 per cent over the past five years while exports have contributed around one-third of GDP (Table 6.1). GDP per capita has grown at a faster rate than other small Pacific island states over the past three decades. The 2008 global economic crisis and the 2009 tsunami have had a harmful impact with negative economic growth recorded in 2009. The recent declines in agriculture, tourism receipts, and remittances from abroad have offset much of the growth in construction, manufacturing, transport and communications.

6.2 MAJOR IMPEDIMENTS TO ECONOMIC DEVELOPMENT

Like many of the smaller island states, an imbalance in foreign trade remains a key issue for the economic development of Samoa. Trade deficits are exceedingly high with the majority of exports derived from an agricultural sector with relatively little value-add or processing of raw materials. Attempts to redress the trade deficit through other areas, such as manufacturing are constrained as finances often originate from remittances, exports of services (e.g. tourism) and foreign aid. The amount received from workers' remittances and compensation of employees alone comprises around 25 per cent of GDP, making Samoa one of the highest recipients of remittances in the world alongside its Polynesian neighbour, Tonga (See Figure 6.1).

Figure 6.1 Workers' remittances and compensation of employees received by Samoa and Tonga, 2001 to 2010 (% of GDP)[13,14]



Source: World Bank (2012), *World Development Indicators.*

Traditionally the *aiga* (extended family) has been the social security system and safety net for Samoans. The Samoan government does not provide social security benefits, insurance or paid child care facilities except for a contributory National Provident Fund for all wage earners and a Pension Scheme for men and women 65 years or older. The traditional systems of financial support are increasingly contending with generational factors such population mobility, communications and urbanisation. Cultural and church obligation costs such as weddings, funerals and title bestowals add further financial pressure on households.

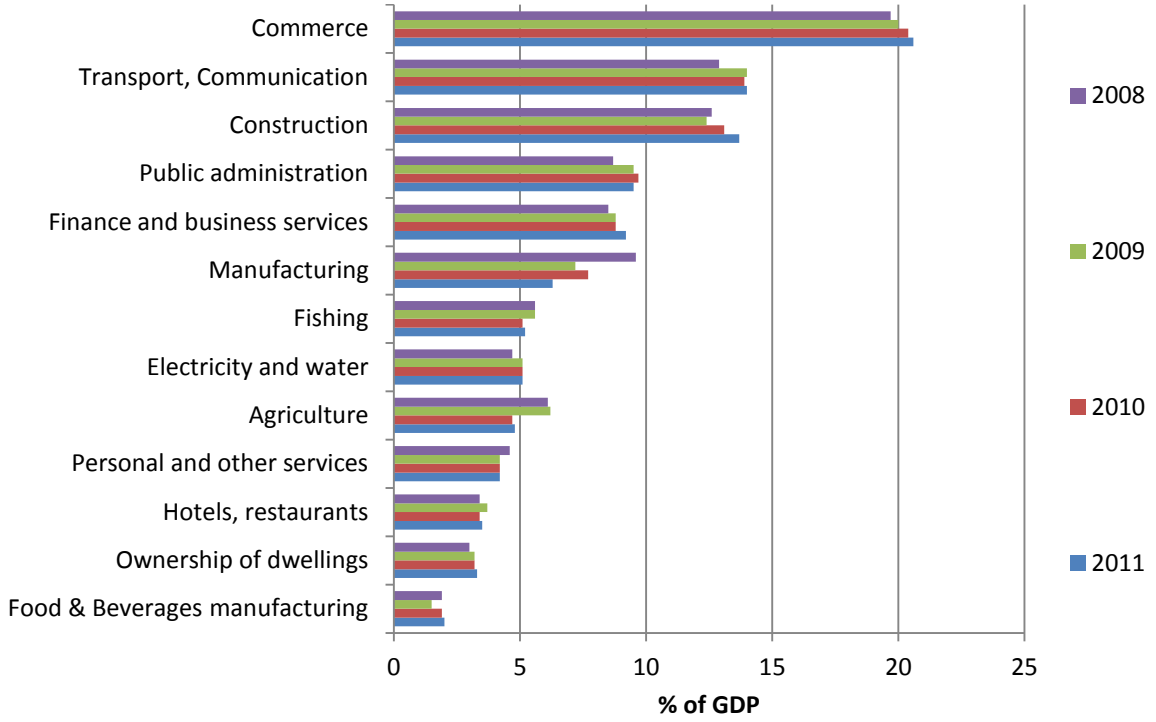
6.3 KEY INDUSTRIES

The key industries consist of agriculture, construction, manufacturing, transport, communications and tourism. Samoa's key exports consist of fish, coconut products, beer, automotive parts (as re-exports from the Yazaki wire harness factory), nonu fruit products and taro. The manufacturing and construction sectors contributed 24 per cent of GDP in 2011 and the commerce and financial services sectors contributed 27 per cent with an upward trend over the five years to 2011.

[13] Estimates based on IMF balance of payments data, and World Bank and OECD GDP estimates

[14] Workers' remittances and compensation of employees comprise current transfers by migrant workers and wages and salaries earned by non-resident workers. Data are the sum of three items defined in the fifth edition of the IMF's Balance of Payments Manual: workers' remittances, compensation of employees, and migrants' transfers. Remittances are classified as current private transfers from migrant workers resident in the host country for more than a year, irrespective of their immigration status, to recipients in their country of origin. Migrants' transfers are defined as the net worth of migrants who are expected to remain in the host country for more than one year that is transferred from one country to another at the time of migration. Compensation of employees is the income of migrants who have lived in the host country for less than a year.

Figure 6.2 GDP by industry, per cent distribution, 2008-2011



Source: SBS (2012), *Gross Domestic Product Overview*, *March 2012.*

A large part of the economy is semi-subsistence farming, fishing and agriculture, where the majority of the people in the rural areas depend on the land and the surrounding seas for many food and money. Although this is an important subsistence activity, particularly in the villages, agriculture and fisheries contribute only 12 per cent to GDP with a downward trend in the five years to 2011.

Samoa's largest private sector employer is Yazaki EDS Samoa, a Japanese-owned company that produces wire harnesses used in the distribution of electricity in cars. The company employs approximately 1000 staff locally, down from a high of 3,000 in 2008. Other international employers include Samoa Breweries which has produced a German-style Vailima beer for over three decades and British American Tobacco has also been in Samoa for a number of years, employing a staff of around 45 in its local manufacturing and distribution operation.

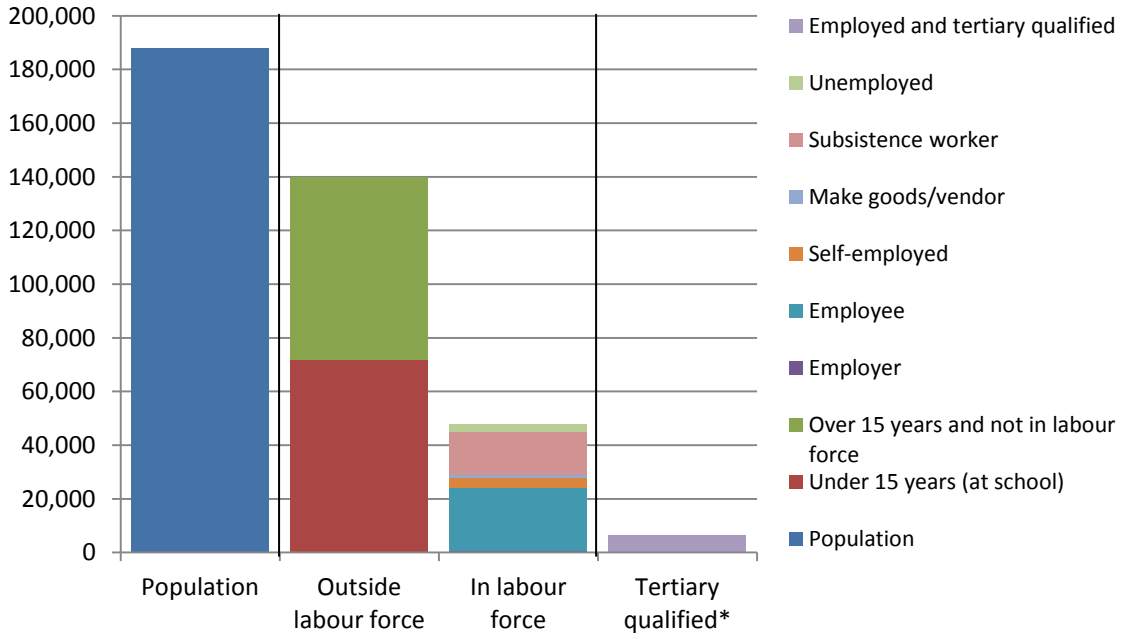
Local employers include Samoa Artesian Water which exports bottled water to the USA, Australia and New Zealand, Natural Foods which produces bottled water, nonu juice and snack foods and the Levai water company, which works under the Small Business Enterprise Centre. Other local products sold by sole traders include paints, coconut products, garments and handicrafts. Recently Samoa has experienced some success in the export of higher value products, most notably virgin coconut oil – a trade forged by local, New Zealand-funded organisation Women in Business Development Inc. supplying The Body Shop – and by pursuing organic and fair-trade premium markets.

6.4 LABOUR FORCE PARTICIPATION AND PROFILE

The most recent Census counts the labour force at 47,927 or 26 per cent of the total population. The estimated labour force participation rate is 41.5 per cent (SBS 2012). Around 36 per cent of the population is over the age of 15 and not engaged in the formal labour force.[15] A further 24 per cent of the population is engaged in employment, of which 9 per cent are identified as employed as subsistence workers. The size and composition of the Samoan labour force is presented in Figure 6.3. This highlights the small number of persons who are tertiary qualified (higher education or TVET) and employed relative to other segments of the population.

The agricultural sector employs 66 per cent of the labour force but contributes just GDP 12 per cent to GDP. The remaining 34 per cent of the labour force is employed mainly by two sectors: industry, which is mostly agro-processing manufacturing and construction and the service sector, which is mostly tourism and hotel services. Not only is the agricultural sector the largest employer, it is also one of the least credentialed sectors of the economy with around 1 per cent of the sector holding formal or non-formal qualifications. Large numbers of excess labour are absorbed by the subsistence sector which makes measurement of an official 'unemployment rate' problematic.

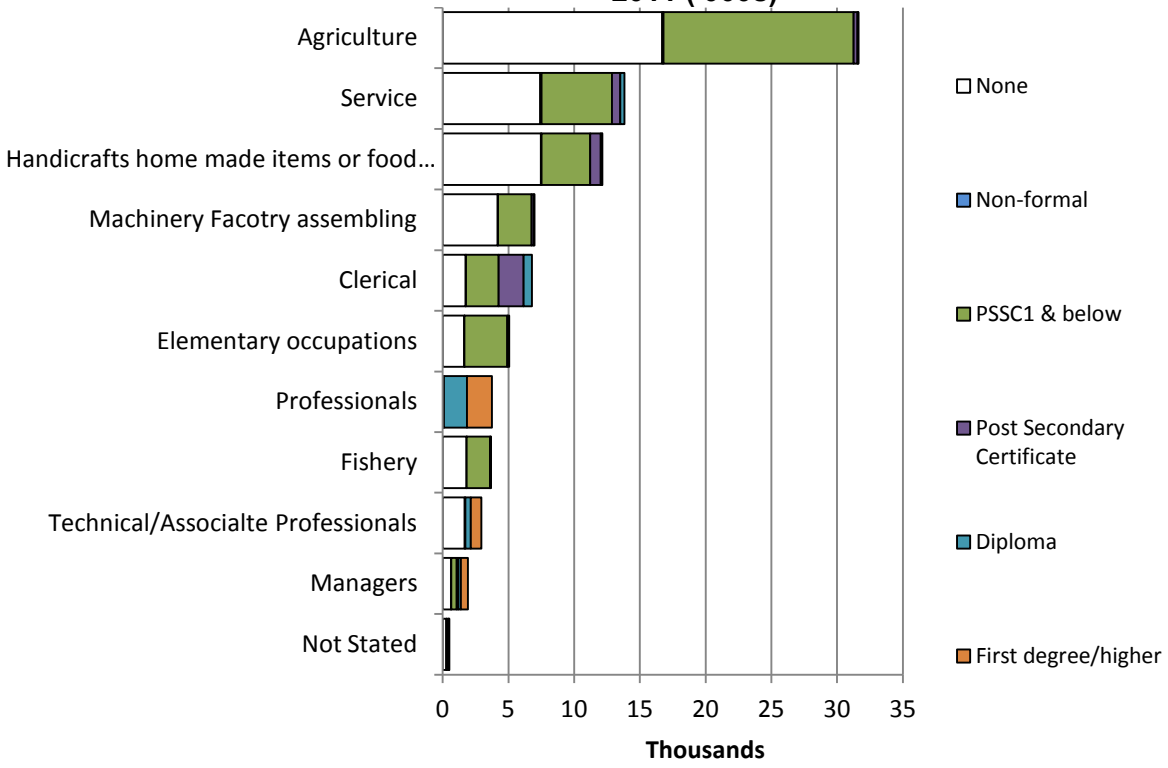
Figure 6.3 Composition of the labour force, 2011



Source: SBS (2012). *Census of Population and Housing, 2011.*

[15] It is unknown the extent to which these people are engaged in full-time education or subsistence village agriculture.

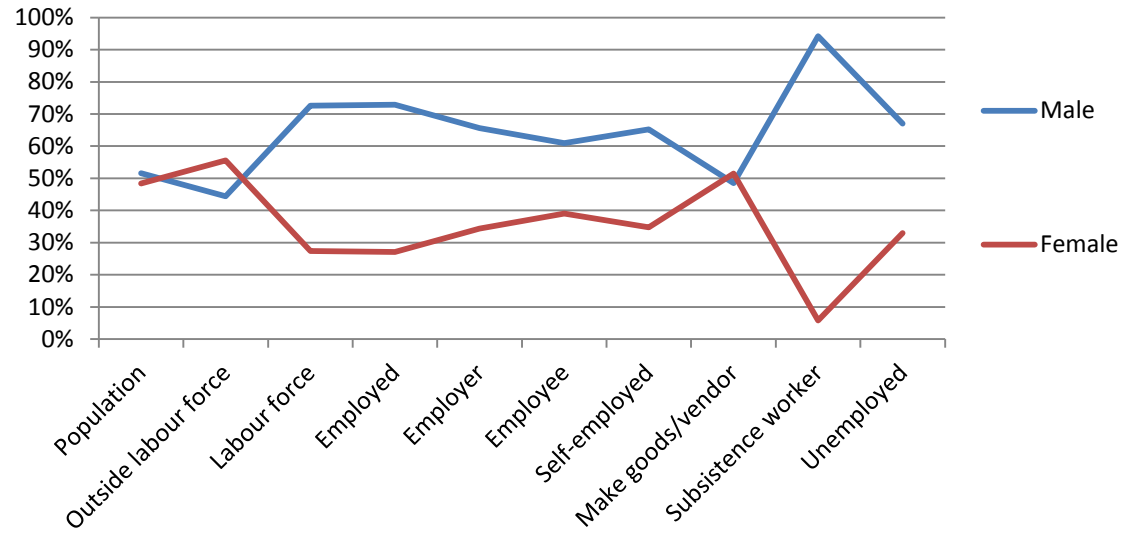
Figure 6.4 Population aged 15 and over, by main occupation and highest qualification, 2011 ('000s)



Source: SBS (2012). *Census of Population and Housing, 2011*.

The supply of jobs in the formal economy, across the public and private sectors, is straining to meet the demand from a booming youth population. Each year, school-leavers attempt to join the labour force, many of them seeking white-collar professional jobs where there are limited vacancies. Employment in the formal economy, in 'professional' occupations is where the majority of qualified people are employed, putting greater pressure on job seekers to hold tertiary qualifications (Figure 6.4). There is also evidence of a considerable gender gap among those in the labour force, which stems from, among other reasons, structural barriers in the job market as well as traditional obligations in Samoan society (Figure 6.5).

Figure 6.5 Composition of the labour force, by gender, 2011



Source: SBS (2012), *Census of Population and Housing, 2011*.

CHAPTER 7. THE PUBLIC SECTOR AND PUBLIC FINANCES

7.1 GOVERNMENT REVENUE AND EXPENDITURE PATTERNS

The Ministry of Finance publishes detailed forward estimates of annual revenue and expenditure, the latest being for financial year 2012-13.[16] Public accounts of actual revenue and expenditure are referred to in Samoa as *Key Performance Indicators of the Public Accounts for the Financial Year*. The most recent of these that are available are for financial year 2007-08. Quarterly public accounts are published in summary form, the latest being for First Quarter 2011-12.

Table 7.1 GoS revenue and expenditure estimates, 2008-09 to 2012-13 (WST millions)

	2008-09	2009-10	2010-11	2011-12	2012-13	*Average annual change*
Revenue						
Government Revenue Raising						
taxes, duties and excises	393.89	348.70	397.41	417.38	447.69	*4.5%*
other government sources	72.80	50.23	74.99	64.54	69.53	*1.6%*
Sub-total	**466.68**	**398.93**	**472.40**	**481.92**	**517.21**	*4.0%*
External Grants	**110.69**	**152.80**	**123.85**	**127.71**	**153.32**	*4.8%*
Total Revenue	**577.37**	**551.73**	**596.25**	**609.63**	**670.53**	*4.1%*
Expenditure						
Recurrent Expenditure						
statutory payments	60.10	75.35	71.05	76.03	76.44	*5.0%*
expenditure programs	409.00	383.13	437.88	430.95	454.97	*3.4%*
unforeseen payments	4.04	11.49	13.14	12.93	13.65	*29.1%*
Sub-total	**473.13**	**469.96**	**522.07**	**519.91**	**545.05**	*3.9%*
Development Expenditure						
loan project expenditure	105.40	118.40	100.98	108.76	116.85	*1.2%*
grant project expenditure	110.69	152.80	123.85	85.95	112.37	*-5.3%*
Sub-total	**216.09**	**271.20**	**224.83**	**194.72**	**229.22**	*-2.1%*
Total Expenditure	**689.22**	**741.16**	**746.90**	**714.62**	**774.27**	*2.0%*
recurrent surplus/(deficit)	(6.45)	(71.03)	(49.67)	(37.98)	(27.84)	
total surplus/(deficit)	**(111.85)**	**(189.43)**	**(150.65)**	**(104.99)**	**(103.74)**	
short-term borrowing	105.40	172.00	149.08	108.76	116.85	
Movement in Cash Balances	**(6.45)**	**(17.43)**	**(1.57)**	**3.77**	**13.11**	

Sources: *GoS Approved Estimates* for the years 2008-09 to 2012-13.

[16] GoS Legislative Assembly of Samoa, Approved Estimates of Receipts and Payments of the Government of Samoa for the Financial Year ending 30th June 2013, Parliamentary Paper 2012/2013 No.2, hereafter referred to as '*GoS Approved Estimates*' for 2012-13.

Table 7.1 shows the GoS revenue and expenditure estimates for the period 2008-09 to 2012-13. The impact of the global financial crisis of 2008-09 and the September 2009 tsunami that devastated much of Upolu Island's south eastern coast had upon both revenue and expenditure is clear. In 2009-10 government revenue raising – both from taxes, duties and excise and from other charges and income sources – fell substantially.

Routine recurrent expenditure programs suffered as a consequence, and whilst there was a surge in external grant and loan project expenditure to partially offset the shortfall, the recurrent deficit blew out from WST 6.45 million to WST 71.0 million, and the total deficit, after allowing for external grants and loans and development expenditure, went from WST 111.5 million to WST 189.43 million. Since then the Samoan economy and the government's fiscal position have recovered somewhat, with both deficits slowly coming off these peaks. The recurrent deficit has fallen from around 18 per cent of government revenue raisings in 2009-10 to a forecast 5.45 per cent for 2012-13. Over the same period the total government deficit has fallen from over 34 per cent of total revenue to less than the 16 per cent forecasted for this current financial year.

Table 7.2 Composition of GoS revenue and expenditure, 2008-09 to 2012-13 (%)

	2008-09	2009-10	2010-11	2011-12	2012-13
Revenue					
taxes, duties and excises	84.4%	87.4%	84.1%	86.6%	86.6%
other government sources	15.6%	12.6%	15.9%	13.4%	13.4%
Sub-total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Government Revenue Raising	80.8%	72.3%	79.2%	79.1%	77.1%
External Grants	19.2%	27.7%	20.8%	20.9%	22.9%
Total Revenue	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Expenditure					
statutory payments	12.7%	16.0%	13.6%	14.6%	14.0%
expenditure programs	86.4%	81.5%	83.9%	82.9%	83.5%
unforeseen payments	0.9%	2.4%	2.5%	2.5%	2.5%
Sub-total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Recurrent Expenditure	**68.6%**	**63.4%**	**69.9%**	**72.8%**	**70.4%**
loan project expenditure	48.8%	43.7%	44.9%	55.9%	51.0%
grant project expenditure	51.2%	56.3%	55.1%	44.1%	49.0%
Sub-total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Development Expenditure	**31.4%**	**36.6%**	**30.1%**	**27.2%**	**29.6%**
Total Expenditure	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
recurrent surplus/(deficit) as per cent of gov't revenue raising	-1.4%	-17.8%	-10.5%	-7.9%	-5.4%
total surplus/(deficit) as per cent of total revenue	-19.4%	-34.3%	-25.3%	-17.2%	-15.5%

Source: Table 7.1.

Meanwhile, as Tables 7.1 and 7.2 show, underlying patterns have reasserted themselves:

- typically, taxes, duties and excise contribute over 85 per cent of the government's own revenue raising, with licences, charges and other revenue sources accounting for the remainder;
- government revenue raising in turn contributes about 80 per cent of total public revenue, with external grants and loans accounting for the remainder;
- recurrent expenditure accounts for the majority of total expenditure, around 70 per cent, with development expenditure taking about 30 per cent;
- routine expenditure programs account for over 80 per cent of recurrent expenditure, the rest is for statutory payments (primarily debt-servicing) and contingencies; and
- development expenditure is equally split between grant and loan project expenditure.

In the wake of the 2008-09 global financial crisis and the 2009 tsunami the government has undertaken financial reform. In May 2010, the Ministry of Finance issued a Fiscal Strategy Statement that read, in part:

> *The 2010/11 financial year will pilot the Ministry of Finance's upgraded template for output definitions and performance measures in an attempt to ensure clear linkage of policy and priorities in planning documents (such as the SDS and sector plans) with budget allocations set out in the approved estimates. This new framework compliments the newly introduced Medium Term Expenditure Framework (MTEF) approach to ensure that priority funding through the budget allocation process (and respective forward estimates) aligns with these priorities set out in national plans.*

The Statement also reaffirmed the Government's medium to long term fiscal targets as follows:

- aggregate current expenditure to be maintained within a range of 35 – 38% of GDP over the forward estimate cycle, to ensure liquidity in the economy is sufficient to foster private sector growth and employment;
- Net Public Debt outstanding to be maintained at less than 40% of GDP;
- personnel costs as a per cent of total expenditure to be constrained to a range of 30 – 32% so as to reflect government's commitment to improved service delivery associated with the implementation of performance budgeting; and
- budget balance is to be maintained within the range of -3.5 and +3.5% of GDP (except where larger deficits involve borrowing at concessional rates to fund growth promoting infrastructure projects).

Ministry of Finance, *Fiscal Strategy Statement Budget 2010/2011*, May 2010, page 4

Table 7.3 provides an indication of the size of the GoS budget relative to GDP over the period 2008-09 to 2010-11.

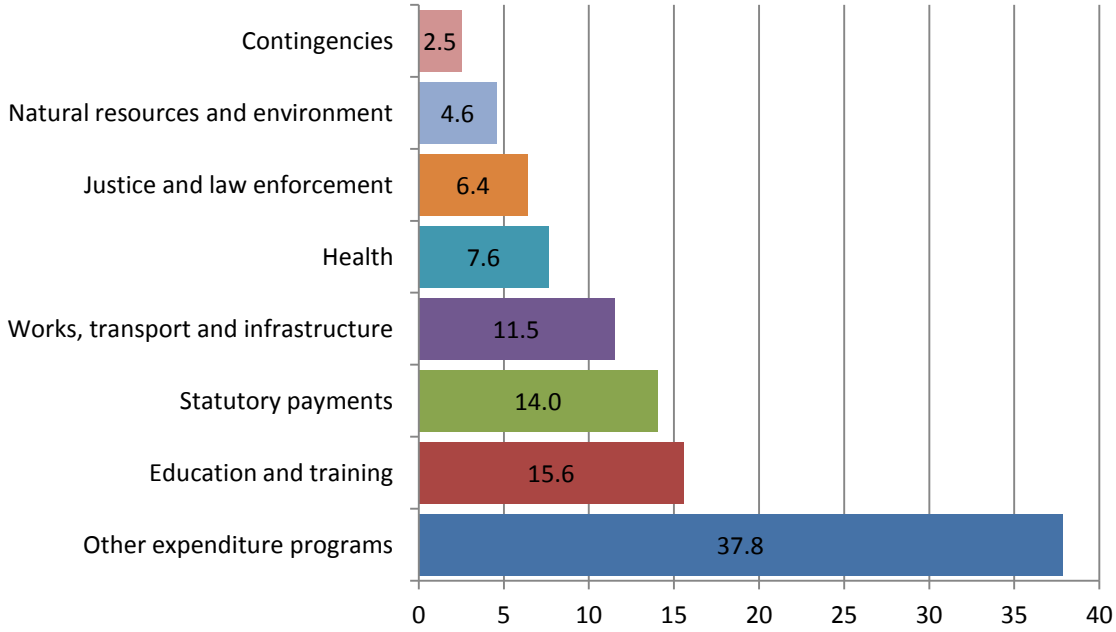
Table 7.3 Public revenue and expenditure as a % of GDP, 2008-09 to 2010-11

	2008-09	2009-10	2010-11
Nominal GDP (current prices WST millions)	**1,417.92**	**1,460.49**	**1,519.28**
Government revenue raising as a percentage of GDP	32.9%	27.3%	31.1%
Recurrent expenditure as a percentage of GDP	33.4%	32.2%	34.4%
Recurrent deficit as a percentage of GDP	0.5%	4.9%	3.3%
Total public revenue as a percentage of GDP	40.7%	37.8%	39.2%
Total public expenditure as a percentage of GDP	48.6%	50.7%	49.2%
Total government deficit as a percentage of GDP	7.9%	13.0%	9.9%

Sources: Ministry of Finance, *Quarterly Economic Review*, July-Sept 2011/12 Issue 54; and Table 7.1.

Government recurrent expenditure on the major areas of responsibility are shown in Figure 7.1. Education and training is estimated to receive 15.6 per cent of the allocation for 2012-13.

Figure 7.1 GoS recurrent expenditure estimates, by category – 2012-13 (%)

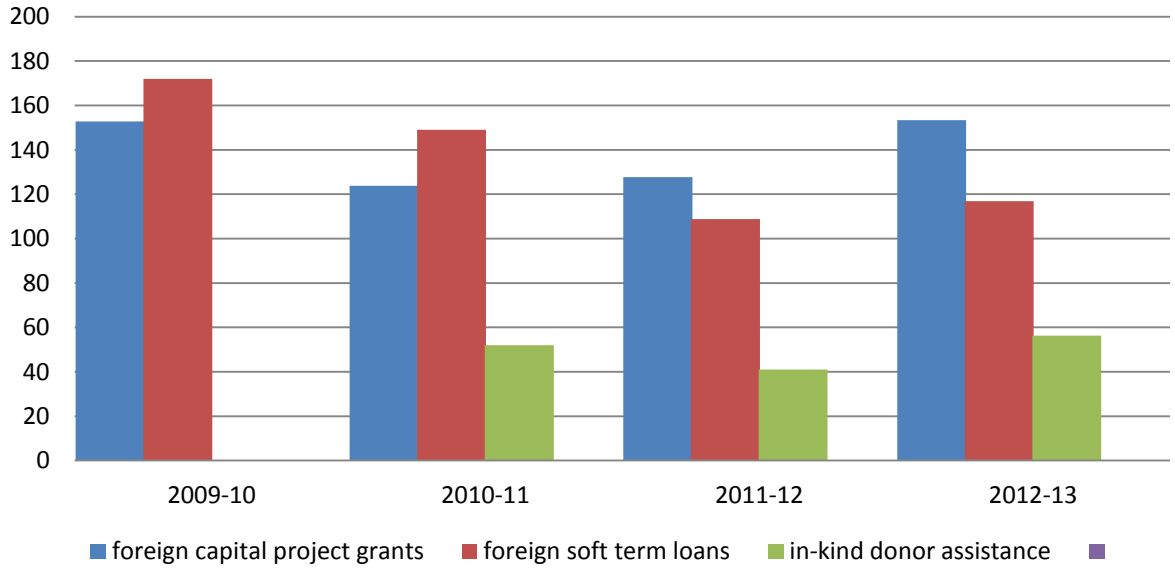


Source: *GoS Approved Estimates* for 2012-13.

7.2 OFFICIAL DEVELOPMENT ASSISTANCE PATTERNS AND TRENDS

Figure 7.2 shows that ODA in the form of grants and loans have come off their peak in 2009-10, with grant assistance rising again strongly through to 2012-13.

Figure 7.2 ODA to Samoa, 2009-10 to 2012-13



Sources: *GoS Approved Estimates* for the years 2009-10 to 2012-13.

Table 7.4 ODA to Samoa, 2011–12

Development partner	WST millions
Bilateral	
Australia[1]	100.6
China	66.7
New Zealand[2]	41.8
Japan[3]	13.6
Multilateral	
Asian Development Bank	44.6
European Union[4]	43.7
World Bank	23.5
United Nations agencies	8.6

1. Australia's contribution was made up of WST 64.1 million in bilateral aid programs and WST 36.5 million in regional and other government department projects.
2. New Zealand's contribution was made up of WST 30.6 million in bilateral programs and WST 11.0 million in regional programs.
3. Japan's figure is for the JICA contribution only, and does not represent the full official development assistance contribution. Figures are for the Japanese financial year.
4. The European Union's contribution does not include regional programs.
Source: AusAID, *Samoa Annual Performance Report, 2011*, June 2012, Table 3.

Key development partners are listed in Table 7.4. They include the top four bilateral partners - Australia, China, New Zealand and Japan, and the major multilateral partners ADB, the EU, the World Bank and various UN agencies.

Figure 7.3 provides an indication of the areas in which Samoa's major donor partners are most active.

Figure 7.3 ODA to Samoa – areas of focus amongst principal donors

Area	Aust	China	Japan	NZ	ADB	EU	IMF	UN	WB
Education	X	X	X		X			X	
Agriculture/ Food Security	X			X				X	X
Energy	X		X		X				
Environment/ Climate Change Adaptation	X			X				X	X
Tourism				X					IFC
Health	X	X		X				X	AAA
Law and Justice	X								
Public Administration	X							X	
Transport and Infrastructure	X	X							X
Communications and ICT		X						X	X
Water and Sanitation					X	X			
Community Development	X							X	
Private Sector				X	X				IFC
Financial Sector				X					IFC
Macroeconomic Framework	X			X	X	X	X	X	X

X = area of focus
IFC = International Finance Corporation
AAA = Analytic and Advisory Activities

Source: World Bank, *Country Partnership Strategy 2012-2016*, March 2012.

Table 7.5 Australia's major expenditure programs in Samoa, 2011 (%)

Objective	WST millions	% of Australia's bilateral program	% of total ODA to sector	Contribution to GoS sector budget
Education	20.1	35%	62%	17%
Health	11.7	20%	26%	10%
Governance & economic stability*	21.4	36%	20%	11%
Law and justice**	5.6	9%	86%	15%

*Governance and economic stability sector is calculated from the operational budgets of the Ministry of Finance, Ministry of the Prime Minister, Legislative Assembly Office, Samoa Bureau of Statistics and Ministry of Natural Resources and Environment.

**Law and justice sector is calculated from the budgets of the Ministry of Justice and Courts Administration, Ministry of Police and Prisons, Office of the Attorney General and Ombudsman's Office.

Sources: AusAID Samoa Annual Performance Report, 2011, June 2012, Table 4; estimates from the New Zealand Aid Programme.

As Table 7.4 indicates, Australia is Samoa's largest partner, providing approximately WST100 million in financial assistance in 2011 – WST 64 million through its bilateral program and estimated WSR 36 million through various regional programs. The bilateral program provides support to Samoa in four priority areas: (i) better quality and more equitable education (ii); improved health services; (iii) governance and economic stability; and (iv) improved law and

justice. The relative weights for these objectives, and the contribution they make to public funding, are indicated in Table 7.5.

7.3 PLANNING AND BUDGET PROCESSES

Samoa developed its first national development plan in the early 1990's. 2012 is on the cusp of two five-year plans - the *Strategy for the Development of Samoa (SDS) 2008-2012,* and its successor *SDS 2012-16*. In Samoa there has been, in principle at least, close synergies between national planning and budgeting, since both fall under the aegis of the Ministry of Finance (MoF).

National and sectoral planning is led by MoF's Economic Policy and Planning Division (EPPD), whilst the budget cycle and the budget allocation process is led by the Budget Division, in consultation with EPPD and the Aid Coordination and Debt Management Division. All planning and budgeting decisions are then made by the Planning and Budget Committee (PBC) of Cabinet, after consultation with the relevant stakeholders. It has been recognised, however, that in the past national and sectoral plans have had little or no costings attached to them, and their budgetary implications have not always been spelt out.[17] Under the new SDS it is expected that there will be significantly stronger links between national and sector plans and budget appropriations.

Samoa has nominally applied an *output-based budgeting* model since the late 1990s, however, it is typical for its recurrent budget *preparation* process to be incremental in nature, based on an annual bidding process by line ministries, followed by a screening process by MoF and PBC, with only moderate links to national and sectoral plans. The development budget, on the other hand, since it is entirely financed by donors, has had stronger links to sectoral planning and the SDS.

With budget *disbursement*, on the other hand, the output-based budgeting model allows line ministries and agencies a certain amount of freedom in the internal allocation of resources. Within any given ministry or agency, funds can be varied or reallocated across outputs (albeit with approval from MoF), but the appropriation of a given output cannot be increased by more than twenty per cent[18]. Within outputs there is also some discretion about shifting funds between inputs – say, between personnel and operating expenses - but within strict limits. Here there is an important difference between ministries (such as MESC) and state-owned enterprises such as NUS and SQA – the latter having more financial flexibility and greater discretion in disbursement of budget funds.

A significant shift within GoS, foreshadowed in the *Fiscal Strategy Statement* of May 2010, that will have a bearing upon how funds, both national and donor provided, are channelled to and are distributed within sectors, such as education, is towards a *sector wide approach* to planning and budgeting. Under this approach, much stronger links have to be made between planning and the recurrent budget, and between the development and recurrent budgets. Sector plans and sector plan costings are to have a greater influence on budget appropriations. Sector-wide MTEF are to be screened alongside ministry and SOE budget submissions during the budget preparation process. Sector-wide outcomes, ministry and SOE level outcomes and performance criteria must also play a part in budget deliberations.

[17] See AusAID *Assessment of the Education Sector's Public Financial Management Systems*, Samoa Final Report, May 2012, page 13

[18] See AusAID Assessment of the Education Sector's Public Financial Management Systems, Samoa Final Report, May 2012, page 22

PART III: TVET IN CONTEXT

CHAPTER 8. THE TVET SECTOR IN SAMOA – AN OVERVIEW

8.1 COMPOSITION OF THE SECTOR[19]

The formal TVET sector in Samoa, within scope of this project, comprises the following institutional components:

- There is one major national public provider, the National University of Samoa (NUS).
- There are two church systems, the Catholic Church and the Methodist Church who oversee colleges that offer certificate and diploma level TVET courses:
  - Don Bosco Technical Centre (DBTC) - owned and operated by the Salesians of Don Bosco in the Pacific sector of the Australia-Pacific Province;
  - Laumua o Punaoa Technical Centre (LPTC) - owned and operated by the Methodist Board of Education of Samoa;
  - Uesiliana Technical and Vocational Centre (UTVC) - owned and operated by the Methodist Board of Education of Samoa;
- There is one privately-run college: Tesese Institute of Administrative Studies (TIAS) – privately owned and operated by a family business.
- There is a regional provider – APTC.

Together these providers are responsible for the majority of TVET provision in Samoa.
In addition there are a number of organisations that offer short course training of the community and continuing education variety

- Oloamanu Centre for Professional and Continuing Education is part of NUS and, in addition to the conducting train-the-trainer program Certificate 4 in Adult Teaching (CAT), it conducts and manages community and continuing education short- courses under the aegis of the Samoa In-Country Training Program (SICTP), in consultation with the Public Service Commission, the Samoa Chamber of Commerce, and the Samoa Umbrella of Non-Government Organisations;
- The Centre for Community and Continuing Education (CCCE) at the USP Alafua campus offers similar programs; and
- The Ministry of Agriculture conducts workshops and short-course training programs for members of the agricultural and rural workforces.

Two government agencies have a role in the oversight, regulation and quality assurance of TVET provision – the Samoa Qualifications Authority (SQA) and the Apprenticeship and Employment Services (AES) division of MCIL. SQA is responsible for, inter alia, the development and application of the Samoa Qualifications Framework (SQF), the registration of training providers and the accreditation of courses, whilst the AES is responsible for the management of the country's apprenticeship program. NUS is the provider of off-the-job training under this program.

TVET in Samoa is trifurcated between its public institutions, its mission and private providers and the presence of the regional TVET provider, APTC. There is little connectivity or commonality of approach between them in terms of system level planning, policy and budgeting, outside the scope of the work undertaken by the SQA.

[19] For an earlier review of the sector, adopting a broader definition of TVET, see ADB, Technical-Vocational Skills Development in Samoa, Technical Assistance for Implementation of Pacific Education Strategy: Skills Development, TA No. 6268-REG, prepared by: Sala P.T.Lene, June 2007

Publicly provided TVET

Since the merger of the Samoa Polytechnic with the NUS, public provision of TVET programs has been progressively integrated with the higher education programs of NUS, within the broader post-secondary education training sphere overseen by SQA.

Consolidation and rationalisation in public PSET began in earnest in 1993 with the establishment of the Samoa Polytechnic, an amalgamation of the previous Western Samoa Trade School and the Maritime Training School. The Samoa Polytechnic became a public body (statutory authority) separate from the Ministry of Education, with its own board. It offered certificate and diploma programs through its Schools of Engineering (SoE), Maritime Training (SMT) and Business and General Studies (SBGS), the latter also offering programs in tourism and hospitality and in journalism. In 1993 the Nurses' Training School amalgamated with NUS and the Teachers' College was subsequently merged into NUS in 1997. In 2006, the Samoa Polytechnic merged with the NUS, to form the Institute of Technology (IoT), alongside the Institute of Higher Education (IHE), the Centre for Samoan Studies and the Oloamanu Centre, which was also established that year. In this same year, the SQA Act was established.

Under the merger with NUS, IoT had its own Academic Board and IHE its own Senate. In 2009 the IoT and IHE were dissolved and full integration into a single institution, with its own encompassing Council, began. The TVET programs delivered by the former SP/IoT were dispersed amongst NUS faculties – the School of Engineering and School of Maritime Studies were combined to form the Faculty of Applied Science; the School of Business and General Studies was absorbed into the Faculty of Business and Entrepreneurship, but with its programs in journalism being hived off into the Faculty of Arts, and some mathematics courses going to the Faculty of Science.

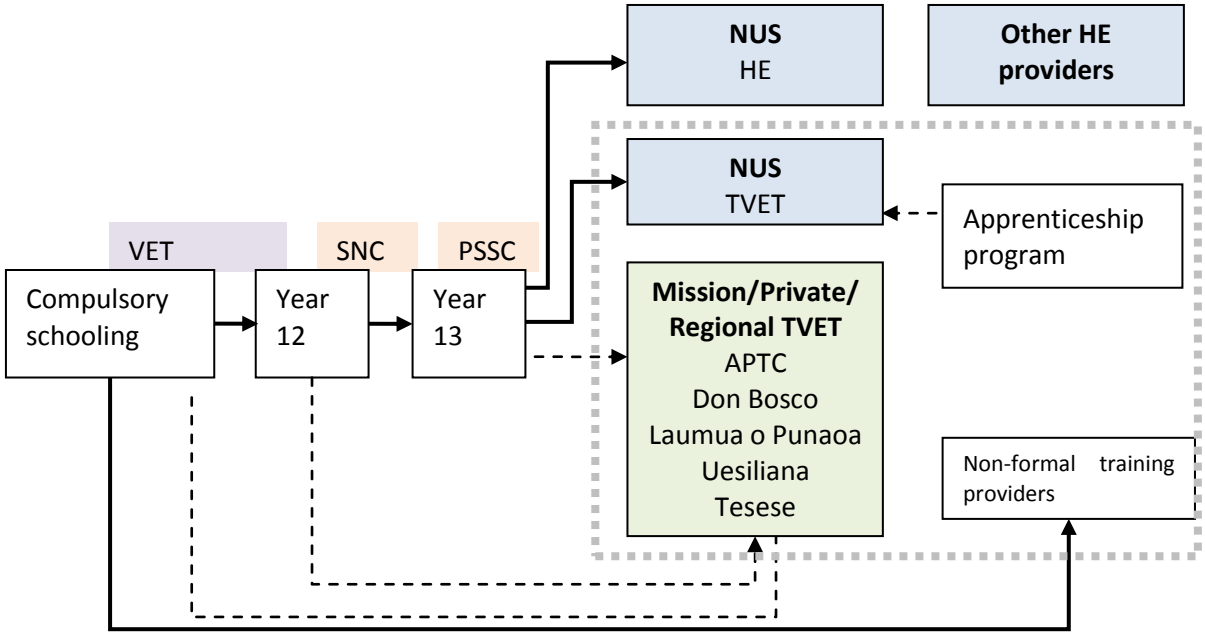
The further this process of amalgamation has gone, and the more integrated public TVET provision has become, into the general operations of NUS and into the ambient PSET, the more difficult it has become to discern a public TVET sector as such.

Privately provided TVET

The church and privately-run colleges listed above, on the other hand, are clearly TVET providers.[20] Moreover, they perform a role in the Samoan education system that is much more typical of TVET providers elsewhere.

[20] They belong to a group that has an organisation – the Samoa Association of Technical and Vocational Education and Training Institutes (SATVETI) - that promotes its members' interests.

Figure 8.1 TVET within the education system of Samoa



As illustrated in Figure 8.1, unlike NUS programs, and those offered by APTC, private TVET providers are open to young people who have not completed 12 years of schooling. As such, these providers play an important role in providing alternative pathways into further training and employment for the majority of young people who drop out of secondary school after Year 8 (see further Chapters 5 and 9).

- *Don Bosco Technical Centre (DBTC)* is based in Alafua, along with its new campus in Savai'i, offers trades training for second-chance learners. Training is delivered as part of a two-part program. The first part is a two-year full-time program focusing on basic life skills, whilst the second focuses on specialised areas of training in motor mechanics, metal fabrication, carpentry and joinery, plumbing and building maintenance. The program includes theory-based subjects in technical drawing, trade mathematics and religion, and in English and Samoan language instruction.
- *Laumua O Punoa LPTC* is based in Faleula and delivers two-year certificate level trade training programs in welding, electrical, textiles, plumbing, automotive, fine arts, carpentry, joinery, cooking and computer studies. Compulsory subjects include English written and spoken communication skills, Samoan and religion
- *Uesiliana Technical and Vocational Centre (UTVC),* based in Satupaitea in Savai'i, offers two-year certificate programs in automotive, carpentry, welding, food nutrition, textiles and fine arts.
- *Tesese Institute of Administrative Studies (TIAS)* is a non-profit TVET provider offering certificate- and diploma-level training in fields such as office skills, office administration, report writing, document production, shorthand and computing. TIAS is a designated Microsoft IT Academy, providing students with access to Microsoft e-learning courseware in the use of programs such as the Microsoft Office suite. The Institute is also a Microsoft Testing Centre, offering professional exams in the use of Microsoft and Adobe software.

The Australia-Pacific Technical College (APTC)

APTC's operations in Samoa are based on the NUS campus. It has been in operation since 2007 and is one of four regional campuses of APTC, whose headquarters are located in Nadi, Fiji.

APTC is an initiative funded by the Australian Government that arose out of the *Pacific Plan* of the Pacific Island Forum of 2005[21] proposal for an international standard centre of training excellence to be established in the region. Through its two schools, the School of Trades and Technology (STT) and the School of Hospitality and Community Services (SHC), APTC offers Australian Certificates III and IV training in automotive; manufacturing and construction, electrical trades, tourism and hospitality, health and community services.

8.2 STATISTICAL PROFILE OF TVET

The quality of the available data, whilst generally good, is patchy, and does not allow a complete analysis of patterns and recent trends in enrolments and graduations to be conducted. The latest year for which there is comprehensive data is 2010.

Overall enrolments

For the period for which there is comparable data, 2007 to 2010, Table 8.1 shows that whilst enrolments grew substantially across the sector, this was not uniform between providers. Student numbers in NUS TVET programs grew over the period, but mostly in the SMT and the Oloamanu Centre. Enrolments in SBGS also grew between 2007 and 2010, but later returned to 2007 levels. SoE numbers, however, declined after 2008 and have remained low.

Table 8.1 Enrolments in TVET programs by institution, 2007 to 2012

	2007	2008	2009	2010	2011	2012
NUS						
School of Engineering	251	258	193	219	213	204
School of Maritime Training	46	43	60	78	60	69
School of Business and General Studies	291	269	355	382	323	296
Oloamanu Centre	81	89	99	108	na	100*
Sub-total	**669**	**659**	**707**	**787**	**596**	**669**
Private providers						
Don Bosco Technical Centre	298	296	263	274	na	200
Laumua o Punaoa	112	92	150	203	na	133
Uesiliana Vocational Centre	47	49	41	38	na	60
Tesese Institute of Administrative Studies	517	586	458	206	na	292
Sub-total	**974**	**1,023**	**912**	**721**	**-**	**685**
APTC						
School of Trades and Technology	na	na	104	86	104	11
School of Hospitality and Community Services	na	na	142	222	136	125
Sub-total	**-**	**279**	**246**	**308**	**240**	**136**
Total	**1,643**	**1,961**	**1,865**	**1,816**		**1,490**

* Estimate.
Sources: SQA *PSET Statistical Bulletin*, 2011, and material provided by institutions.

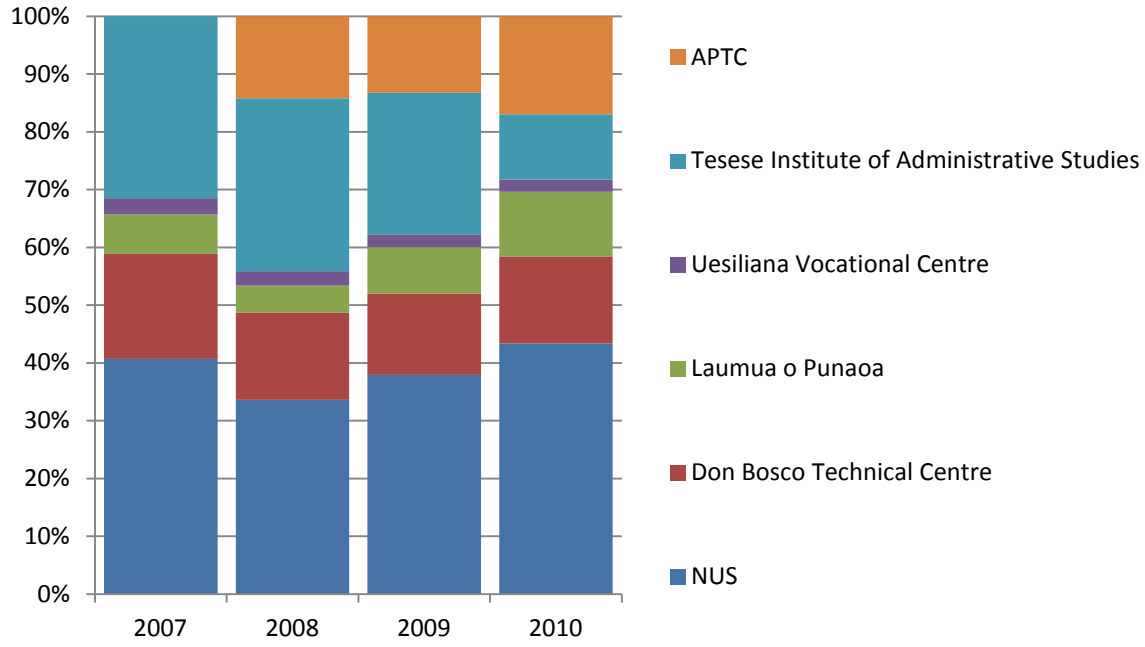
Enrolments in private providers fluctuated over the period, but overall did not exhibit any discernible growth. The exception was LPTC, whose enrolments almost doubled between 2007 and 2010.

[21] Pacific Island Forum Secretariat, Pacific Plan for Strengthening Regional Cooperation and Integration, revised version, 2007

APTC enrolments have fluctuated considerably since the college established a campus in Samoa, primarily as a consequence of the contractual arrangements between the Australian Government and APTC management.[22]

Figure 8.2 shows the relative importance of each of the three TVET sub-sectors in terms of enrolments between 2007 and 2010. Of the 1800 students enrolled in TVET programs in 2010, NUS and the private providers shared just over 80 per cent more or less equally, with APTC accounting for the remaining 17 per cent.

Figure 8.2 Enrolments in TVET programs, by provider, 2007 to 2010 (%)

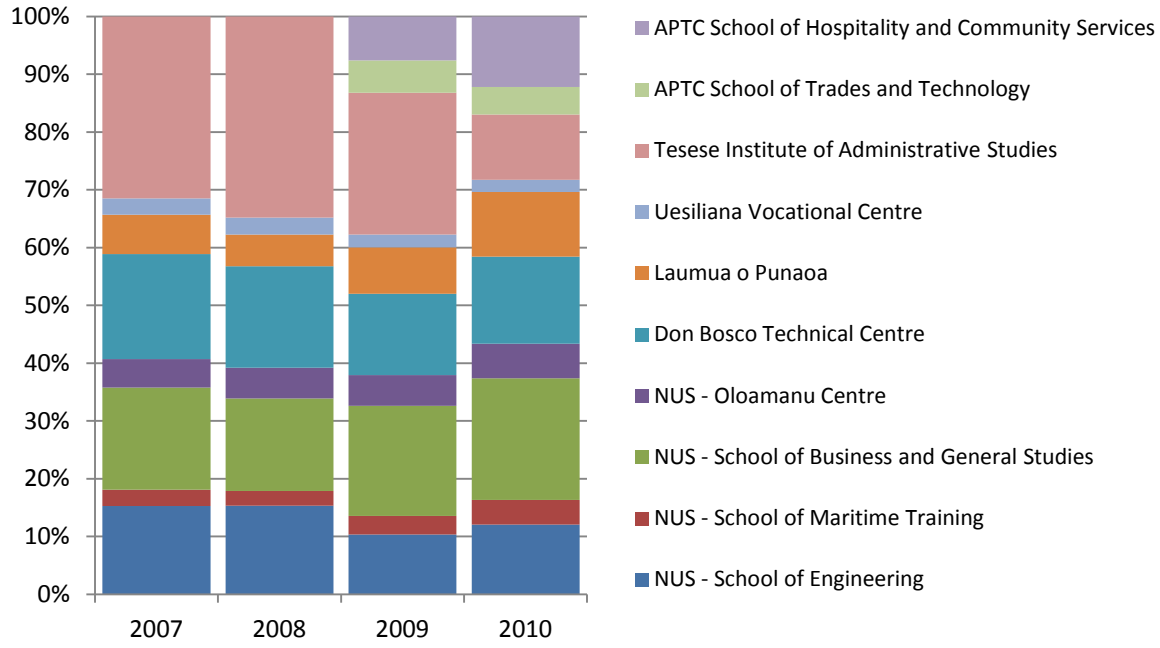


Source: Table 8.1.

The contribution each school and centre made to enrolments in 2010 is evident in Figure 8.3. The NUS School of Business and General Studies had the largest number of enrolments, followed by the Don Bosco Technical Centre. The SHC (APTC), SoE (NUS) LPTC and SIAT, all accounted for roughly around 11–12 per cent each, whilst SMT and the Oloamanu Centre (NUS) and STT(APTC) each contributed about 4-6 per cent. UTVC was the smallest at just over 2 per cent.

[22] In Stage 1 of its operations (2007-2011) APTC, across all its campuses and schools, was given global, not annual, enrolment targets. With the advent of Stage 2 (2011-2014), this stipulation has been relaxed. It has meant, however, that operations on campuses such as in Samoa have had to build up enrolment numbers again.

Figure 8.3 Enrolments in TVET programs, by provider and school, 2007 to 2010 (%)



Source: Table 8.1.

Fields of training

In this study the fields of training classification and coding system devised by European Centre for the Development of Vocational Training (CEDEFOP), in conjunction with Eurostat, the Statistical Office of the European Communities, has been used.[23]

Table 8.2 sets out the enrolments in each of the three TVET sub-sectors in 2010 by CEDEFOP fields of study. These data show:

- Training in mechanics and metal work (automotive, welding, fitting and machining, etc) accounts for the largest enrolments across the board (20 per cent), followed by computer use (13 per cent) and tourism, travel and leisure (11 per cent)
- Mechanics and metal work, and building and civil engineering (construction and joinery, plumbing, etc) are the only two fields in which programs are offered by all three sub-sectors
- Of the remaining fifteen TVET fields of study in which training is conducted in Samoa, five are offered by two of the sub-sectors, but the remaining ten fields of study are available in only one or other of the three.

[23] Classification of enrolments by field of education/training is particularly important in programs such as those offered by TVET providers because of the strong emphasis upon the vocational links between what is being taught and subsequent employment. Unlike programs of general education that seek primarily to enhance personal development vocational programs are much more focused on imparting skills and knowledge of use in particular occupations and professions. Standardisation of that classification is important because it allows for a uniform analysis of the composition of offerings within institutions and for aggregation and comparison across institutions offering similar programs
See European Centre for the Development of Vocational Training (CEDEFOP) *Fields of Training Manual*, Eurostat, 1999

Table 8.2 TVET enrolments, by field of training, 2010

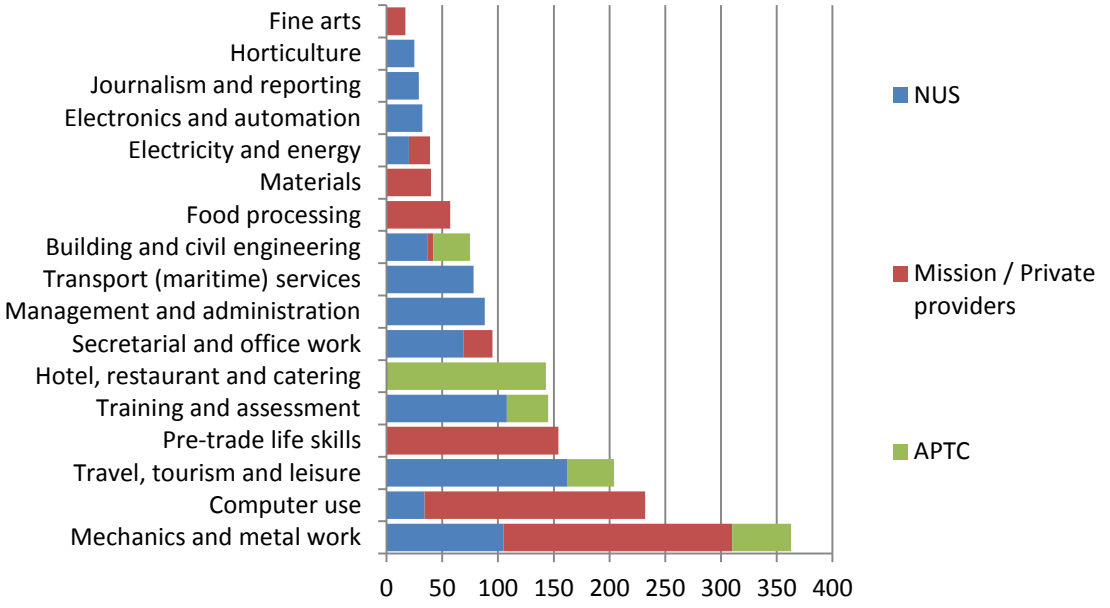
Field of training*		NUS	Private providers	APTC	Total	% of Total
521	Mechanics and metal work	105	205	53	363	20.0%
482	Computer use	34	198	-	232	12.8%
812	Travel, tourism and leisure	162	-	42	204	11.2%
90	Pre-trade life skills	-	154	-	154	8.5%
114	Training and assessment	108	-	37	145	8.0%
811	Hotel, restaurant and catering	-	-	143	143	7.9%
346	Secretarial and office work	69	26	-	95	5.2%
345	Management and administration	88	-	-	88	4.8%
840	Transport (maritime) services	78	-	-	78	4.3%
582	Building and civil engineering	37	5	33	75	4.1%
541	Food processing	-	57	-	57	3.1%
543	Materials	-	40	-	40	2.2%
522	Electricity and energy	20	19	-	39	2.1%
523	Electronics and automation	32	-	-	32	1.8%
321	Journalism and reporting	29	-	-	29	1.6%
622	Horticulture	25	-	-	25	1.4%
211	Fine arts	-	17	-	17	0.9%
Total		**787**	**721**	**308**	**1,816**	**100.0%**

* CEDEFOP coding and classification system.

Sources: SQA *PSET Statistical Bulletin*, 2011, and material provided by institutions.

Overall, it can be said that whilst a broad range of study fields are offered by the TVET sector in Samoa, the three sub-sectors have tended to specialize somewhat, and do not appear to duplicate provision in core areas of TVET delivery (Figure 8.4).

Figure 8.4 Enrolments in TVET programs, by field of training, 2010



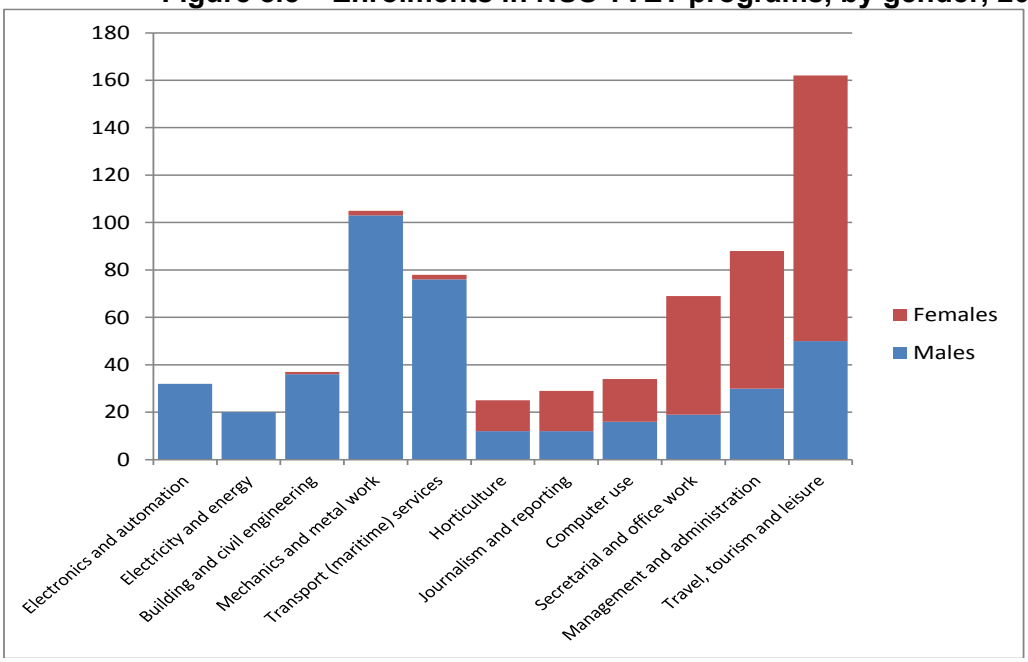
Source: Table 8.2.

Enrolments by gender

Of the eleven TVET fields of training offered by NUS in 2010, all but two had female enrolments. However, as Figure 8.5 makes clear, there was a clear preference for some programs over others by most females enrolled in TVET programs. Indeed, female students accounted for the majority of enrolments in the fields of secretarial and office work, management and administration, and travel tourism and leisure.

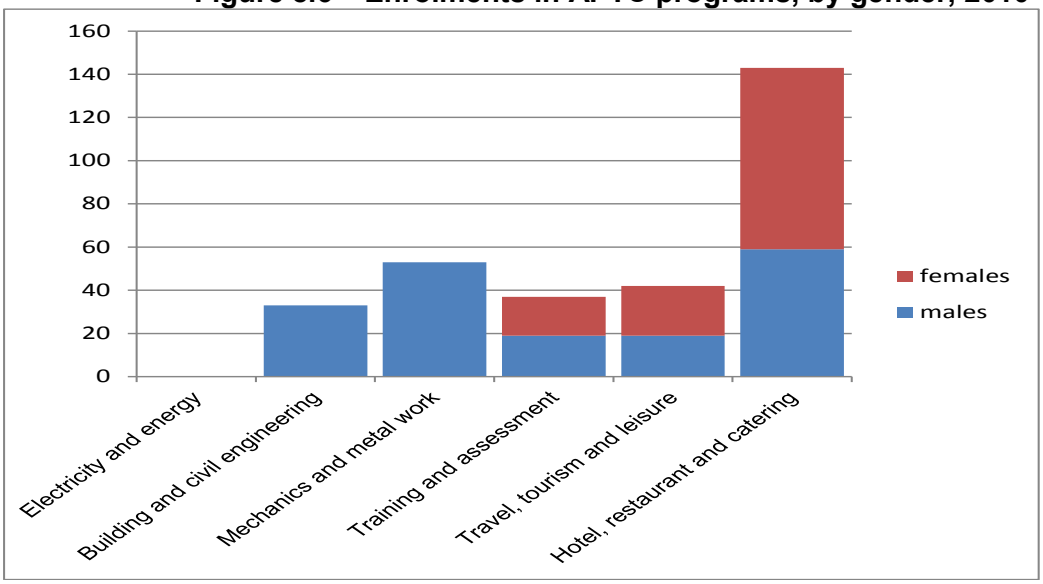
Figure 8.6 demonstrates a similar preference set amongst female enrolments in APTC programs in that year.

Figure 8.5 Enrolments in NUS TVET programs, by gender, 2010



Source: Material provided by NUS.

Figure 8.6 Enrolments in APTC programs, by gender, 2010



Source: material provided by APTC.

Overall graduations

Table 8.3 Graduates from TVET programs by institution, 2007 to 2012

	2007	2008	2009	2010	2011	2012
NUS						
School of Engineering	88	102	71	85	74	
School of Maritime Training	44	43	53	0	53	
School of Business and General Studies	104	158	147	130	142	
Oloamanu Centre	na	na	na	na	na	
Sub-total	**236**	**303**	**271**	**215**	**269**	**-**
Private providers						
Don Bosco Technical Centre	126	113	102	105	na	
Laumua o Punaoa	44	29	44	51	na	
Uesiliana Vocational Centre	18	14	28	24	na	
Tesese Institute of Administrative Studies	30	27	46	46	na	
Sub-total	**218**	**183**	**220**	**226**	**-**	**-**
APTC						
School of Trades and Technology	na	na	10	161	128	29
School of Hospitality and Community Services	na	na	115	170	166	83
Sub-total	**-**	**37**	**125**	**331**	**294**	**112**
Total	**454**	**523**	**616**	**772**	**563**	**112**

Sources: SQA *PSET Statistical Bulletin*, 2011, and material provided by institutions.

Graduation numbers from TVET institutions for the period 2007 to 2010 are given in Table 8.3. Graduations from the three TVET schools in NUS varied from year to year, but showed no discernible trend either up or down. Amongst the mission and private providers, graduations were also more or less static, except from TIAS programs, where graduations increased by over 50 per cent between 2007 and 2010. The big increases over the same period, however, came from APTC programs. After the initial establishment period, and before the transition from Stage 1 to Stage 2 of its operations, graduations from both its schools rose rapidly.

Table 8.4 TVET graduates, by field of training, 2010

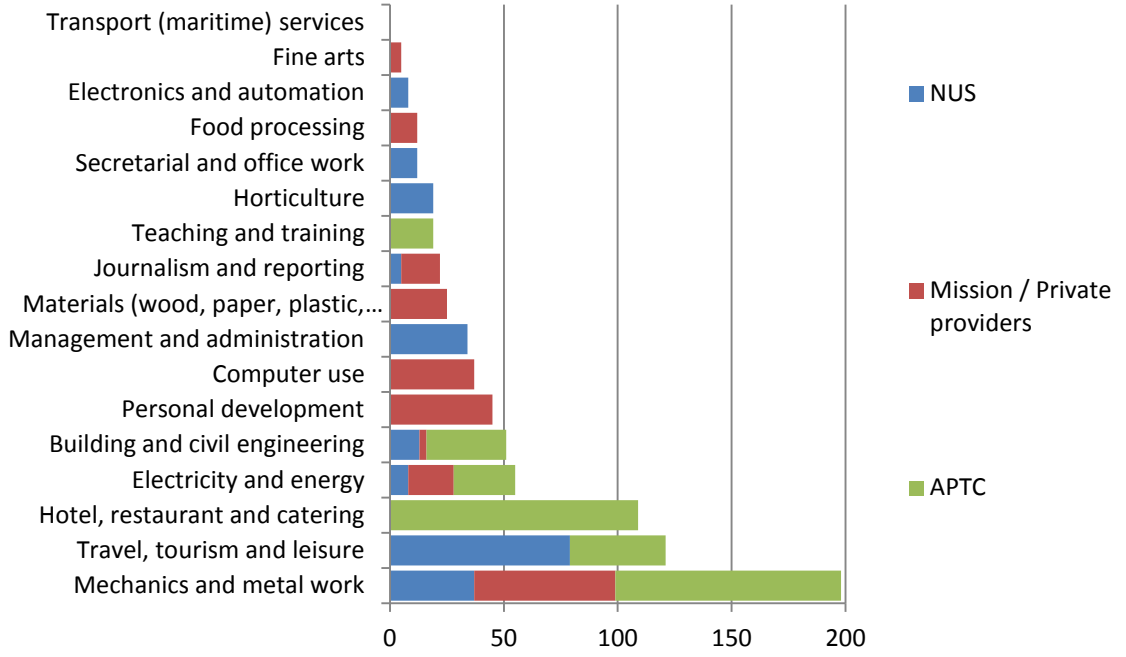
Field of training		NUS	Private providers	APTC	Total	% of Total
521	Mechanics and metal work	37	62	99	198	25.6%
812	Travel, tourism and leisure	79	-	42	121	15.7%
811	Hotel, restaurant and catering	-		109	109	14.1%
522	Electricity and energy	8	20	27	55	7.1%
582	Building and civil engineering	13	3	35	51	6.6%
90	Personal development	-	45	-	45	5.8%
482	Computer use	-	37	-	37	4.8%
345	Management and administration	34	-	-	34	4.4%
543	Materials (wood, paper, plastic, glass)	-	25	-	25	3.2%
321	Journalism and reporting	5	17	-	22	2.8%
114	Teaching and training	-	-	19	19	2.5%
622	Horticulture	19	-	-	19	2.5%
346	Secretarial and office work	12	-	-	12	1.6%
541	Food processing	-	12	-	12	1.6%
523	Electronics and automation	8	-	-	8	1.0%
211	Fine arts	-	5	-	5	0.6%
840	Transport (maritime) services	-	-	-	-	
Total		**215**	**226**	**331**	**772**	**100.0%**

Sources: SQA *PSET Statistical Bulletin*, 2011, and material provided by institutions.

Classifying TVET graduates by the fields of training they had just completed is undertaken in Table 8.4 and Figures 8.7, these show that:

- whilst the TVET sector graduated a wide range of skilled young people in 2010, over fifty per cent graduated from just three fields of training – mechanics and metalwork, tourism, travel and leisure and hotel, restaurant and catering
- the impact APTC programs had on graduate numbers in that year, and
- the tendency to specialization in the three TVET sub-sectors. (It also highlights the anomalous situation in 2010 when there apparently where no graduates in transport (maritime) services from SMT at NUS)

Figure 8.7 Graduates by institution and field of training, 2010



Source: Table 8.4.

Apprenticeship program

The apprenticeship program combines full-time work and part-time study outside business hours. The program is administered by MCIL's Apprenticeship and Employment Services (AES) division and delivered through the NUS. Apprentices complete 3-4 years or 6,000-8,000 hours of training. Certificates of Due Completion are awarded to candidates who are assessed at the completion of their training as competent in their trades. Apprenticeship training is divided into two components - on-the-job training (training provided by a qualified tradesmen or employer); and off-the-job training (training provided by NUS). Apprenticeships are available across the following limited range of trades: motor mechanics; electrical; refrigeration; fitting and machinery; welding; plumbing; and carpentry and joinery.

The entry requirement for an apprenticeship is the completion of Year 11 (school certificate) and secure employment in a trade appropriate to course the candidate wishes to study. If the applicant does not have a Year 11 level of schooling, then five years of stable employment is considered to be equivalent. The fees are paid through an arrangement whereby government contributes 40 per cent; individuals contribute 30 per cent and employers contribute 30 percent. In some instances, employers will pay the individual's contribution.

Table 8.5 shows apprenticeship numbers and those successfully completing apprenticeships over the period 2007 to 2010. The numbers have remained stable in recent times, at least until 2010 when the numbers of apprentices in training more than doubled. Later figures will show how these figures flow through in to completed apprenticeships. The table also shows that apprenticeships in just two trades – motor mechanics and electrical – account for over half the total number apprenticed.

Table 8.5 reflects the narrow range of training that focuses on traditional trade apprenticeships in industry sectors where females are traditionally under-represented.

Table 8.5 Apprenticeship enrolments and graduates, 2007 to 2010

Certificate of Due Completion	Enrolments				Graduates			
	2007	2008	2009	2010	2007	2008	2009	2010
Motor Mechanics	16	19	21	36	11	5	4	2
Electrical	17	17	16	30	6	5	3	3
Refrigeration	4	4	3	9	3	3	3	3
Fitting and Machinery	4	3	2	11	2	5	3	2
Welding	6	5	4	7	3	4	3	3
Plumbing	9	8	6	13	3	4	5	5
Carpentry and Joinery	7	6	5	17	3	4	7	7
Total	**63**	**60**	**57**	**123**	**31**	**30**	**28**	**25**

Source: SQA *PSET Statistical Bulletin*, 2011.

APTC as a regional TVET provider

APTC Samoa is one of the college's four campuses operating in the Pacific region, and that its mandate is to provide training opportunities for qualified applicants from other countries not just from Samoa. Table 8.6 underlines this point, by showing that in 2011 students from other countries made up the majority of enrolees on the Samoa campus (62 per cent) and small proportion of graduates (48 per cent). The proportion of non-Samoan students amongst STT programs was much greater (76 per cent) than in SHC (52 per cent). Similar patterns can be observed amongst those graduating that year.

Table 8.6 Nationality of APTC enrolees and graduates, 2011

School/program	Enrolments			Graduates		
	Samoa	Other PIC	Total	Samoa	Other PIC	Total
School of trades and technology						
Automotive mechanical technology	-	-	-	4	10	14
Mechanical trade (fitting and machining)	3	10	13	5	11	16
Fabrication trade (boiler-making)	8	28	36	16	7	23
Electro technology - electrician	-	-	-	3	35	38
Plumbing	9	24	33		18	18
Refrigeration and air-conditioning	5	17	22	5	14	19
Sub-total	**25**	**79**	**104**	**33**	**95**	**128**
School of hospitality and community services						
Tourism	15	18	33	16	19	35
Hospitality	21	22	43	34	7	41
Hospitality – commercial cookery	11	18	29	17	9	26
Hospitality Supervision	4	12	16	11	22	33
Training and assessment	14	1	15	30	1	31
Children's services	-	-	-	-	-	-
Disability work	-	-	-	-	-	-
Sub-total	**65**	**71**	**136**	**108**	**58**	**166**
Total	**90**	**150**	**240**	**141**	**153**	**294**

Note: PIC refers to Pacific Island Countries.
Source: APTC supplied material.

To further underline the regional nature of APTC, in the same year 25 Samoan students were enrolled in college programs in Fiji, in programs not offered on the Samoan campus.

CHAPTER 9. TVET AND EDUCATIONAL OPPORTUNITIES

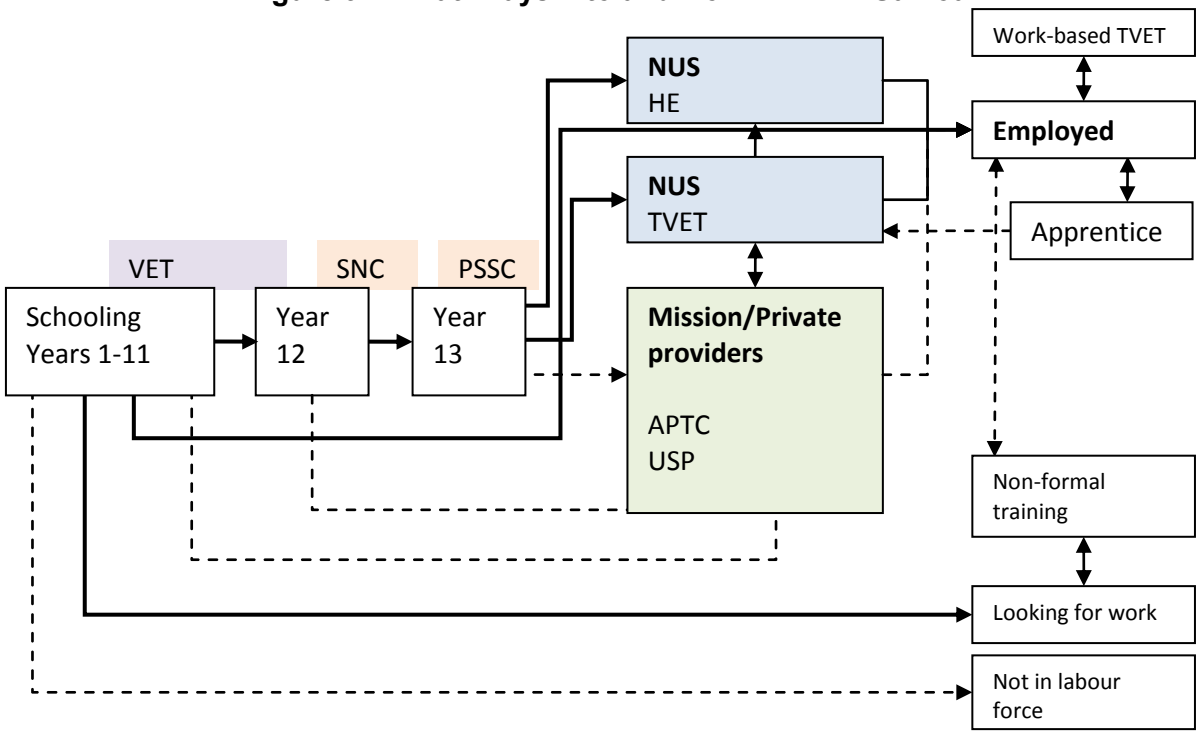
9.1 EDUCATIONAL AND OTHER PATHWAYS INTO AND BEYOND TVET

For school leavers, the mainstream pathway into post-secondary TVET is through admission into the National University of Samoa, APTC or one of the church or privately-run TVET providers. Progression along this pathway is predicated on achievement in two exit examinations:

the *Samoan National School Certificate* to certify students leaving at Year 12 and to select students for Year 13; and
the *Pacific Senior Secondary School Certificate (PSSC)* administered by the South Pacific Board of Educational Assessment (SPBEA) at the end of Year 13 as a pre-requisite for enrolment at the tertiary level.

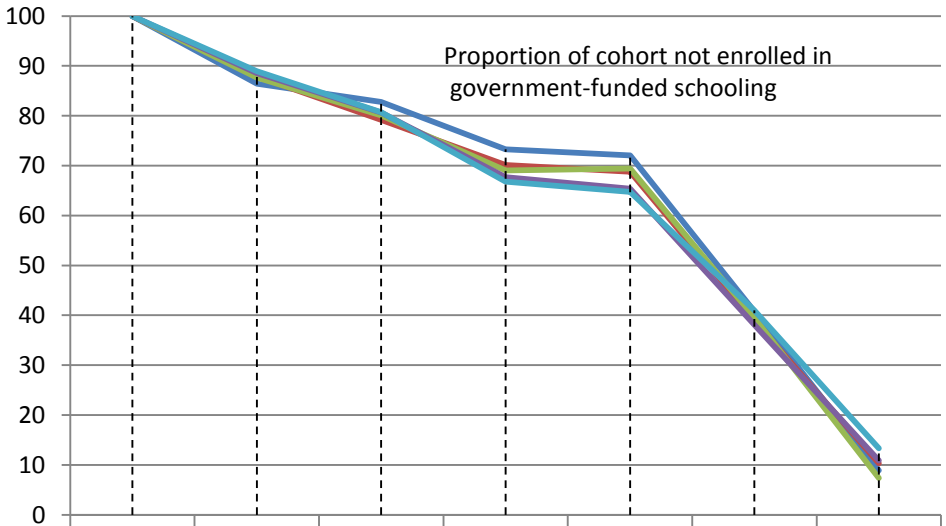
Figure 9.1 presents the potential educational and employment pathways available to individuals as they transition from compulsory schooling (Years 1 to 8) into the labour force. The standard entry requirement for students into the NUS is a Year 13 NSSC pass of Grade 5 in English and any other two subjects. Anecdotally, a large proportion of students who do not meet these requirements return to live in the villages to render service for their *aiga* (extended family) in helping with the family plantation and other family activities.

Figure 9.1 Pathways into and from TVET in Samoa



A key challenge facing the Samoan education system is the increasing level of students withdrawing from school before Years 12 and 13. These final years of secondary school are predominantly undertaken by young people wishing to continue on to higher education studies. Of the students who do transition into secondary education, which is non-compulsory, around 40 per cent complete Year 13 and only 10 per cent undertake a TVET program at NUS (Figure 9.2). By comparison, around 15-20 per cent of Year 8 students transition to a higher education program at NUS after completing secondary education – with a relatively greater proportion of females than males making that transition.

Figure 9.2 Apparent retention rates for students enrolled in Year 8 in government schools (as a percentage of Year 8 completions)



	Yr 8	Yr 9	Yr 10	Yr 11	Yr 12	Yr 13	NUS TVET
Cohort 2001	100.0	86.4	82.8	73.3	72.1	40.8	8.9
Cohort 2002	100.0	87.9	79.2	70.1	68.8	39.0	10.3
Cohort 2003	100.0	87.7	80.1	69.0	69.4	39.5	7.4
Cohort 2004	100.0	88.5	80.7	67.7	65.4	38.1	10.9
Cohort 2005	100.0	89.0	80.7	66.8	64.7	41.0	13.3

Source: Ministry of Education, Sports and Culture, *Statistical Digest 2010.*

This decline in apparent retention rates for secondary school students occurs for a wide variety of reasons, including: the inability of parents to afford schools fees; lack of parental support and low priority placed on education; loss of interest in school; peer pressure to drop-out of school; chronic health problems; and misbehaviour by the child in school (Afamasaga *et al*. 2005).

As in many countries, TVET is considered by many parents as a second-class option for children who are unable to continue along the traditional academic pathway.[24] In response to these perceptions, stakeholders in the Samoan TVET sector point to the need for a paradigm shift towards a 'parity of esteem' model which would position TVET on the same standing as the 'high-status' university pathways.

There is limited evidence to demonstrate the preferences of students for TVET relative to other educational and employment pathway options. However, student destination surveys administered through the SQA indicate that many school leavers have difficulty finding employment in the formal sector, and either emigrate or go return to the semi-subsistent informal village economy sector. It is reasonable to say that school leaver options are constrained by a number of factors including: the imperative to gain employment as soon as possible to support family members; the competitive academic criteria for entry into tertiary education; the fees needed to undertake TVET study; and the perceived returns to the individual of completing a TVET qualification.

[24] ADB, Technical-Vocational Skills Development in Samoa, Technical Assistance for Implementation of Pacific Education Strategy: Skills Development, TA No. 6268-REG, prepared by: Sala P.T.Lene, June 2007

9.2 ACCESS TO TVET FOR DISADVANTAGED GROUPS

In Samoa, the people who are often most affected by hardship include: landless families or individuals, unemployed youth and parents, single income households, families with multiple children, people living in isolated villages with poor transport, and people with a disability (MESC 2007). 'Access' remains an issue for groups such as these across a number of basic services, including education and training.

Samoa's relatively dispersed population, described in Chapter 4, is not reflected in its TVET provision in terms of its access and availability. The majority of provision occurs in Apia and its surrounds, with the exception of Uesiliana Technical Centre and the newly established Don Bosco Centre in Savai'i.

The main provider of TVET in Samoa, the NUS, delivers courses centrally from the Apia campus on Upolu with often over-crowded buses transporting students from other parts of the island.

The MESC Strategies Policies and Plan July 2006 – June 2015 noted that:

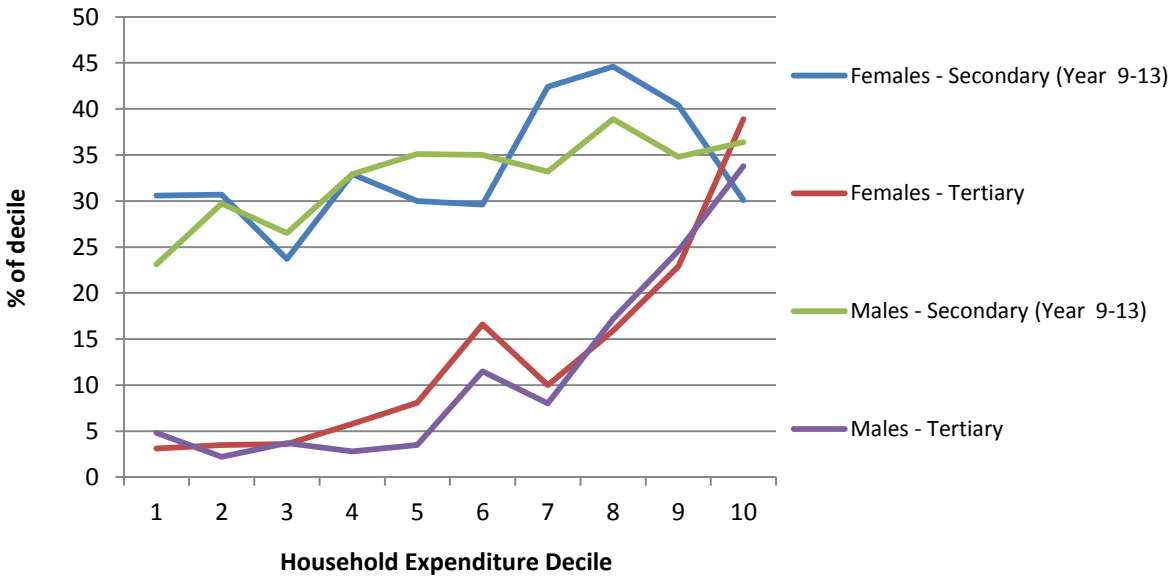
> *'...the main problem continues to be that of accessibility. This includes the distance of provider institutions from target students, cost of training including expensive infrastructures and provision of appropriate pathways for all kinds of clientele' (MESC 2006).*

Addressing the need of communities and disadvantaged groups based outside Apia are private providers and NGOs offering low-cost training to those who face barriers to participation in TVET. Many of these providers, such as the Catholic and Methodist-operated TVET specialist schools have not increased fees in recent years in recognition of the high cost of TVET to school leavers, disadvantaged groups and young people more generally.

The type of non-formal training offered by small NGOs outside of Apia covers areas such as project management, budgeting and leadership. These short-courses courses may also be extended to agricultural and subsistence worker support programs. In Samoa these programs are offered by members of national bodies like Samoa Umbrella of Non Government Organisations, Samoa Association of Manufacturers and Exporters and Women In Business Development Incorporation.

Structural barriers to participation in TVET are still prevalent but have diminished in recent years for some groups. Examples of these changes include private government and church-run schools offering TVET subjects to female students in traditionally male-dominated trade areas such as carpentry and electrical. The available data on occupation by qualification level shows evident returns for both males and females to completing a tertiary qualification in Samoa. Persons with formal tertiary qualifications feature in the highest deciles of household expenditure – with similar patterns apparent for both males and females (Figure 9.3). However, the level of household expenditure by those who have graduated with a secondary qualification follows a less linear path, particularly for females.

Figure 9.3 Per capita household expenditure by educational attainment, urban females 15-59 years of age[25]



Source: SBS (2010), *A Report on the Estimation of Basic Needs Poverty Lines, and the Incidence and Characteristics of Hardship and Poverty*.

The provision of TVET subjects more generally as part of the secondary curriculum indicates a shift towards more open access to TVET across a broader group of learners. Specialist private schools are increasingly offering disabled students with basic training in foundation skills, however this is still on a very limited basis.

9.3 SCHOLARSHIPS AND OTHER FINANCIAL MECHANISMS

Scholarship programs are often the defining factor in whether a student is able to enrol in a course or not. As in other Pacific countries, scholarships can play a key role in improving access for those from disadvantaged backgrounds to study at home or abroad.

A review of the scholarships offered to Samoan students shows that they are typically offered to high-achievers who are near the end of secondary schooling or those who have commenced their foundation year programs at NUS. The types of scholarships offered to Samoan students aim to assist students with the cost of:

- Tuition fees;
- Air travel, if required;
- Relocation and study allowance—contribution towards as accommodation expenses, text books, study materials;
- Contribution to basic living expenses;
- Introductory orientation programs—a compulsory 4-6 week program prior to the commencement of formal academic studies covering information on life and study in the hosting country;
- Health insurance to cover basic medical costs;
- English language courses; and
- Bridging or academic support courses.

[25] Note: Households have been classified into deciles ranked according to the level of per capita expenditure 1 = lowest, 10 = highest.

The main sponsoring organisations are the Government of Samoa, the Australian Government and NZAID. Scholarship programs of note include: the *Australian Development Scholarships*, which offers 12 places in Australian tertiary education institutions in priority areas; and the New *Zealand Pacific Scholarships*) which offers 25 places in NZ institutions to the top ranking school leavers who come through the National University of Samoa's Foundation Year.

The *APTC Scholarship Awards* provide funds for students across the Pacific region to access training at the Australian/New Zealand standard. There are two streams: the *full award* which assists with tuition fees, living costs, travel and medical costs; and a p*artial award* which assist with costs of tuition. The *New Zealand Regional Development Scholarships* target the top 3 students from the NUS to study at APTC Samoa.

CHAPTER 10. TVET AND ECONOMIC GROWTH AND DEVELOPMENT

10.1 THE ROLE OF TVET IN ECONOMIC GROWTH AND DEVELOPMENT

The pivotal study *Skilling the Pacific* begins with the statement:

> *A nation's economy runs on the knowledge and skills of its people. Skills development is becoming a priority for countries in the Pacific, fuelled in part by the surging numbers of youth who have completed formal schooling yet lack the practical skills that are useful in the labour market. Skills formation has also become a priority in countries of the Pacific where job growth and emigration have created skills shortages.*[26]

This is a sentiment echoed across the world, and is what places the TVET at the very interface, in every country, between social policy on the one hand and economic policy on the other. It is seen as being a major player in providing youth with the skills to make the transition to being productive employable adults and in ensuring employers have the supply of skilled workers they need to successfully conduct their businesses.

SQA was established in 2006 in recognition of these key linkages, as is clear in the following statement from the first PSET strategic plan:

> *Samoa is small by world standards, but the complexity of the education and training needs are no less than for a much larger country. Samoa will face increasing pressures for consistency and quality of learning and skills in the future.*

The number of young people coming of employment age over the next decade will increase rapidly. Government and private sector employers will demand higher skill and competency levels as the enterprise based economy continues to evolve. The importance of research to stimulate innovation, and the demands created by new technology will grow. Many young Samoans will seek employment overseas.

There is growing demand for international recognition and portability of qualifications stimulated by expansion of international trade, expanding cross border business networks, and international skill shortages.

People are becoming aware of new opportunities and are moving to countries where they can gain employment and build futures for their families. Nations with particular development needs are increasingly looking to meet them through international recruitment of people who are already trained. This is in turn creating a demand for internationally recognised processes that enable the validation of skills and competencies. The opportunities are occurring at all levels, professional, skilled vocational-and semi-skilled and the demand for international creditability of qualifications is intensifying as more unethical practices are exposed.

In the past many young Samoans have gone overseas to access learning opportunities and to gain internationally 'credentialed' qualifications. For them to be able to complete training in Samoa more cheaply in a supportive environment and to know that the outcomes will be internationally recognised, has many advantages. Not only does it create new employment pathways it also makes it easier for more learners to subsequently access international training with increased confidence.

[26] ADB, Skilling the Pacific: Technical and Vocational Education and Training in the Pacific, 2008, page xvii

The issues become more complex with time. Not everyone has an opportunity to participate in paid employment and the number of available paid jobs will always be less than the demand. A large proportion of the population gets its livelihood from a variety of sources of which the semi-subsistence and informal sectors are important sources. Opportunities for people to be creative and productive in different ways of earning a living are as important as formal qualifications. The need for vision and strong innovative stewardship to ensure a 'holistic' approach for PSET will become more important as Samoa continues to advance its overall development goals.

10.2 TVET AND MIDDLE-LEVEL OCCUPATIONAL SKILLS

The particular role of TVET is to provide training to meet the middle-level range of skills required by the formal economy – the skills that enable entry into the band of occupations covered by ISCO-08 broad categories 3 to 7 (see Figure 2.1).

Table 10.1 uses the latest information about the industrial/occupational composition of the Samoan labour force to indicate the focus of skills supply of the six providers of structured TVET programs. In very broad terms there were in 2010 not more than 5,000 employed in the occupations that require the skills provided by these institutions. With an annual output of between 500 and 700 graduates (see Table 8.3) that equates to a potential supply of new job-seekers of around 10 -15 per cent of the total coming on to the market each year. That is a very high figure for these occupations to absorb, especially in a climate of little if any growth in key industries such as manufacturing, construction and tourism.[27]

Anecdotally, it is understood that a number of those are graduates of APTC Samoa who will return to their respective countries. Amongst the local TVET graduates, a number will find employment in New Zealand, Australia and elsewhere, and others will find employment in occupations outside of the range for which their TVET courses prepared them. An unknown number, do not find employment and either become unemployed or leave the labour force.

In this context there is a clear need for TVET planning that seeks to match skill requirements with training programs, and this has to be of a two-pronged nature – at the strategic level it needs to closely involve industry/employers in the planning of TVET, and at the operational level it needs a labour market information clearing house where enterprises can signal their skill requirements and job vacancies and job-seekers can register their preferences, qualifications, job-experiences etc. It is not apparent, from the data available, the extent to which these two-pronged interventions are functioning in Samoa or how they are being monitored over time.

[27] See MCIL, Labour Market Survey of Private Sector Employers in Samoa,2010, Table 2.1 and MoF Quarterly Economic Review, Issue 54, September Quarter 2011

Table 10.1 Employment in the formal economy, by industry and occupation, 2010

industry	ISCO-08 broad occupational category									total
	1	2	3	4	5	6	7	8	9	
Accommodation, Cafes, Restaurants	169	37	36	177	1,229	57	83	13	308	**2,109**
Agriculture Forestry Fishing	38	21	5	34	24	46	3	11	35	**217**
Building and Construction	65	31	57	36	39	2	292	153	212	**887**
Community Social and Personal Services	118	144	53	110	297	6	35	32	108	**903**
Education, Welfare	66	731	15	78	58	4	37	11	51	**1,051**
Electricity, Gas and Water Supply	31	26	54	114	10	9	194	121	89	**648**
Finance, Insurance, Real Estate and Business Services	262	173	252	403	199	5	46	70	190	**1,600**
Manufacturing	124	62	40	73	97	7	293	799	124	**1,619**
Transport, Storage and Communication	91	33	113	105	87	7	34	102	56	**628**
Wholesale and Retail Trade	227	85	81	246	629	15	327	87	207	**1,904**
Total	**1,191**	**1,343**	**706**	**1,376**	**2,669**	**158**	**1,344**	**1,399**	**1,380**	**11,566**
TVET providers			**NUS**	**NUS**	**NUS**		**NUS**			
			APTC		**APTC**		**APTC**			
							DBTC			
							LPTC			
							UTVC			
				TIAS						

ISCO-08 broad occupational categories	
1	Senior executives and managers
2	Professionals
3	Technicians and Associate Professionals
4	Office clerks
5	Service workers and shop and market sales workers
6	Skilled agricultural and Fisheries workers
7	Skilled Crafts and related Trades workers
8	Semi skilled workers/ machine operators and Assemblers
9	Labourers

Source: MCIL, *Labour Market Survey of Private Sector Employers in Samoa*, 2010, Table 3.

CHAPTER 11. QUALITY IN TVET

11.1 THE SAMOA QUALIFICATIONS AUTHORITY

The notion of quality has achieved prominence in the Samoan post-secondary education and training sector in recent years through the establishment of the Samoa Qualifications Authority (SQA). Previous reviews have observed a lack of system-level oversight of TVET in Samoa whereby providers were each '*paddling their canoes in their own direction'.*[28] The issue of sectoral oversight remains central to system-level initiatives pursuing quality of inputs, processes and outcomes.

There are a number of TVET qualifications offered in Samoa which:

- Are similarly titled and described but positioned at different PQF/SQF levels in terms of their complexity of learning;
- Are based on inconsistent nomenclature (e.g. introductory, basic, intermediate, advanced, due completion);
- Offer little in the way of mutual or international recognition between providers;
- Are severely constrained by the financial resources necessary to deliver at the desired level;
- Are delivered by providers who are not bound by legislated qualification or professional experience requirements of their teachers and trainers;
- Are offered over variable durations of time; and
- Result in uneven outcomes for graduates and their employers.

To assist with improving the level of quality of the PSET system, the SQA was established to: register PSET[29] providers; accredit programs; undertake quality audits of PSET providers; register qualifications on the Samoa Qualifications Framework (SQF); and quality assure non-formal learning. Initiatives being undertaken by SQA include the development of national competency standards and national qualifications in the trades.

Registration of providers

The SQA considers provider registration to be 'an evaluation of the capability of an organisation to provide and maintain a well organised, sound and stable learning environment encompassing all its modes of delivery' (SQA 2009, p.10). At the time of the fieldwork SQA was in the process of registering all PSET providers in Samoa with 11 of 26 achieving registered status at that time.[30]

A provider's registered status is maintained annually through payment of the annual renewal registration fee by 31st January of each year (see Table 11.1). The current fee for local providers is $300 for sub-degree programs and $600 for degree programs and above. The criteria for provider registration examines the:

- organisational governance and structures;
- ensures that it is established for educational purposes;
- has suitable management structures and systems and has the necessary financial resources, staff; and
- necessary equipment and materials to provide educational programs.

[28] ADB, Technical-Vocational Skills Development in Samoa, Technical Assistance for Implementation of Pacific Education Strategy: Skills Development, TA No. 6268-REG, prepared by: Sala P.T.Lene, June 2007.
[29] PSET refers to all learning activities that occur outside of the formal early childhood education, primary and secondary education school system and includes both formal and non-formal learning.
[30] As per SQA *Statistical Bulletin* 2011.

Table 11.1 SQA fees structure for registration of providers

Fee Name	Level	Amount
Registration Fee (Local)	Sub Degree Degree & above	$300 $600
Registration Fee (Overseas) 70% reduction	n/a	$20,000
Renewal Annual Registration Fee (Local)	Sub Degree Degree & above	$150 $300
Renewal Annual Registration Fee (Overseas) 70% reduction not applied	n/a	$10,000
Registration of non-formal organisation	n/a	$0

Source: SQA *Fee Structure*, August 2010.

Accreditation of programs

Education and training providers who wish to offer programs of learning which lead to national qualifications must first gain program accreditation from SQA. The SQA considers program accreditation to be *'the process used to evaluate an organisation's capability of delivering an education or training program to the required standards (SQA 2009, p.11).* Provider/organisation qualifications are registered on the Samoan Qualifications Framework (SQF) as part of the program accreditation process.

In instances of local auspicing or twinning arrangements, SQA policy states that *'the organisation whose programs are accredited bears the program accreditation costs'.* The costs are based on SQA's Fee Structure which identifies payment levels for panel assessors and program accreditation (see Table 11.2).

Table 11.2 SQA fees structure for accreditation of programs

Fee Name	Level	Amount
Program Accreditation Fee (Local or overseas Provider)	n/a	Fee charged based on the actual cost
Panel Fee (Assessors fee)	Sub Degree Degree & above	$250/day $500/day
Program Accreditation Fee		$1,200-$2,375/day plus daily allowance and airfare
Program Accreditation Fee for Programs that are accredited by an Overseas Standards Setting Agencies		Special Audit may be undertaken and attract a cost
Non-formal education and training recognition fee	n/a	$100 per activity

Source: SQA *Fee Structure*, August 2010.

Quality audits

In addition to setting up their own Quality Management Systems, registered PSET providers are required to conduct internal self evaluations and audits. Ultimately, audit by an independent third party is also required for ongoing registration. Unless the audit is funded directly by Government, the audited organisation bears the costs based on the SQA's Fee Structure (see Table 11.3).

Table 11.3 SQA fees structure for SQA audits

Fee Name	Level	Amount
Audit Fee	Sub Degree Degree and above	$500 $1,000
Special Purpose Audit	n/a	$500

Source: SQA *Fee Structure*, August 2010.

Curriculum development and validation of assessment

A significant TVET curriculum project was implemented at the NUS between 1997 and 2001 to convert all trade program curriculum to competency-based training and assessment. This was achieved by rewriting the curriculum into modules for each course. Now, with the exception of the NUS, TVET providers use the traditional time-based delivery model, partly due to the significant cost of developing a new competency-based training curriculum.

The SQA has system level oversight over assessment and moderation. In addition to the accreditation of existing programs, all new curricula must meet the standards set by SQA in order to be included in the qualification framework. The SQA requires registered providers to have *'adequate and appropriate systems of assessment and also the expected outcome of programs'.* There is limited evidence, however, to identify the extent to which programs are moderated, internally and externally.

Although direct input from industry into the curriculum development process is limited, SQA registration processes have assisted with improving the level of employer engagement with this process

Industry engagement

The development and coordination of curriculum at NUS changed considerably with the introduction of Industry Advisory Panels (IAP) in 2001. Under the IAP arrangement all new or reviewed programs were sent to industry representatives with an opportunity to review and adjust programs to better meet the needs of industry. IAPs previously met four times a year and were provided a sitting fee.

Unfortunately, the number of meetings and resulting level of industry engagement with NUS has reduced in recent years, largely due to funding constraints. A 2010 SQA report on '*Perspectives of Post School Education and Training Stakeholders involved in the Apprenticeship Scheme in Samoa'* found that feedback from industry had been 'quite lacking over the years' (p.39).[31]

MCIL administers a trades testing scheme in conjunction with the Apprenticeship Council and the NUS. The purpose of the scheme is '*to provide the means whereby those persons who achieved their present status by experience on-the-job only may obtain formal recognition of their skills'* (MCIL 2012).

Two grades of test, grades 1 and 2, are available in: Construction and Joinery Furniture; Plumbing and Sheet Metal; Automotive Engineering; Welding and Fabrication; Fitting and Machining; Electrical; and Air-Conditioning. Workers who successfully pass a trade test will

[31] SQA does report, however, that with its sector wide approach taken in the development of Samoa qualifications, several Sector Advisory Groups [in trades, agriculture, tourism, traditional skills, etc] have been recently established, thus raising the level of industry and employer engagement in development of national competency standards and Samoa qualifications.

receive an authoritative certificate of proficiency in their trade at varying levels of skill which will give them a recognised status in industry and by the Public Service Commission. A fee of $50 Tala is charged for trade tests.

The qualification awarded to apprentices, the Certificate of Completion, is awarded by MCIL in co-operation with the NUS and the Apprenticeship Council. Although curriculum development and quality assurance are the responsibility of NUS, apprentices are presently not subjected to the NUS academic process.

11.2 TEACHERS AND TEACHER TRAINING

Pre-service teacher education is provided mainly at the NUS in the Faculty of Education. Some pre-service training for pre-schools is offered by USP and a small number of NGOs. Like other fields of study, prospective secondary teachers must have completed Year 13 PSSC to study education at the NUS. The NUS Faculty of Education is responsible for:

- the Education stream of the Foundation Certificate;
- a two-year Diploma in Education program for pre-service students;
- a three-year Bachelor of Education degree program for pre- and in-service students; and
- a one-year Graduate Diploma in Education program for those with a first degree from a recognised university who wish to gain a professional qualification for teaching.

The professional qualification for teachers is a 3-year Diploma in Education. In reality, teachers hold a diverse combination of qualifications. There are also a large number of mature teachers who hold only a primary teaching diploma from the former Teachers College before amalgamation with the NUS in 1997.

Graduates from the teacher education programs have little difficulty gaining employment in the school system every year as there is a significant under-supply of teachers in Samoa. Once employed, in-service teacher education is conducted mainly by the Ministry of Education, Sports and Culture. Opportunities for in service education and training are also accessed by teachers who go back to university to upgrade their qualification towards a degree at the NUS, overseas on a government scholarship or the USP by distance mode.

Professional development for teachers and trainers

TVET teachers and trainers are encouraged to undertake a Certificate in Adult Teaching, however there is no legislative requirement for TVET teachers to hold the qualification. TVET teacher qualifications range from postgraduate degrees to certificates levels, with the majority at the Certificate level (see Table 11.4). Generally, the NUS require a minimum of 5 years industry experience to teach at the Certificate or Diploma levels. Previously, there was some evidence to suggest a lack of formal teacher training for TVET teaching staff which has been somewhat alleviated since the introduction of the JICA-funded CAT program.[32] A Bachelor of Technical, Vocational Education and Training is being developed by the Faculty of Applied Science at the NUS.

A number of NGOs are delivering basic professional training and awareness-raising workshops for communities in the non-formal sector. However, there is no formal approach to training trainers in adult learning concepts outside the NUS Oloamanu Centre. Importantly,

[32] ADB, *Technical-Vocational Skills Development in Samoa, Technical Assistance for Implementation of Pacific Education Strategy: Skills Development*, TA No. 6268-REG, prepared by Salā P.T.Lene, 2007.

many trainers have no formal training in the principles and practice of effective adult teaching training. With limited funds, the pool of SUNGO trainers are developing programs to develop the capacity of NGO's in the areas of teacher training and adult learning.

Table 11.4 TVET teaching staff qualifications (all qualifications)

	No qual	Certificate	Diploma	Bachelor	Postgraduate
Australia-Pacific Technical College*	0	7	7	0	0
Don Bosco Technical Centre	2	27	6	0	0
Laumua o Punaoa Technical Centre	0	26	12	4	0
Uesiliana Technical and Vocational Centre	1	6	2	0	0

* School of Tourism and Hospitality and School of Health and Community Services only.
Source: SQA *Statistical Bulletin 2011.*

11.3 TVET WORKING ENVIRONMENT

In March 2006 the NUS and the Samoa Polytechnic were merged. At the time the *MESC Strategic Policies and Plan 2006-2015* (p.27) noted that:

"There is a danger in the merging of the NUS and Samoa Polytechnic in that TVET courses may lose their identity and vigour in a higher education institution. This must be avoided at all costs and appropriate policies at NUS must be put in place."

The introduction of the NUS Act 2006 coincided with the Government of Japan officially handing over to the Government of Samoa the newly completed Institute of Technology campus, which formed part of the JICA project for the upgrading and extension of the former Samoa Polytechnic. The newly structured NUS provided over 60 academic, vocational and professional programs through the then Institute of Technology, the Institute of Higher Education, the Centre for Samoan Studies and the Oloamanu Centre. In March 2011 the Council approved the complete integration of the Institute of Technology and Institute of Higher Education.

The majority of TVET programs at NUS operate out of the Faculty of Applied Science comprising the School of Engineering and the School of Maritime Training; [33] and the Faculty of Business and Entrepreneurship, comprising the School of Accounting and Economics and the School of Management, Tourism and Hospitality.

There are increasing expectations of TVET lecturers to follow traditional and academic career pathways so as to build parity and uniformity between the higher education and TVET teaching staff at the NUS. For example, a Bachelor of Technical, Vocational Education and Training is being developed to lift qualifications to the degree level.

[33] Of the university's six faculties, only the Faculty of Applied Science is yet to offer a degree program.

Analysis of TVET activity across a selection of providers in Samoa reveals:

- Average class sizes vary according to the type of program and capacity of staff and the size of facilities. The student staff ratios range from 4.8 at Uesiliana and 10.7 at Laumua to 39.1 at Don Bosco and 36.8 at APTC (see Table 11.5); and

- Average teaching loads per week for a normal daily timetable are 25 – 30 classes. Institutions offering part time programs after working hours can have up to 40 periods per week.[34]

Table 11.5 Staff numbers and student to staff ratios, 2007 to 2010

	2007	2008	2009	2010
Australia-Pacific Technical College*				
Staff		19	17	6
Student to staff ratio	39.8	14.7	14.9	36.8
Don Bosco Technical Centre				
Staff	28	29	27	7
Student to staff ratio	10.6	10.2	9.7	39.1
Laumua o Punaoa Technical Centre				
Staff	17	17	14	19
Student to staff ratio	6.6	5.4	10.7	10.7
Uesiliana Technical and Vocational Centre				
Staff	8	8	10	8
Student to staff ratio	5.9	6.	4.1	4.8

* School of Tourism and Hospitality and School of Health and Community Services only.
Source: SQA *Statistical Bulletin 2011.*

11.4 SQA QUALITY AUDIT PROCESS

A quality audit is the process used to evaluate an organisation's effectiveness against the SQA Quality Standard, and to ensure that it continues to comply with registration and program accreditation criteria. Under the *SQA Quality Standard*, providers are required to demonstrate at audit that they are compliant with the following ten standards:

- **Organisation** - The provider is an enduring legally recognised body with an appropriate name, measurable goals and objectives for the delivery of education and training, and effective governance and management systems to enable the ongoing achievement of its goals and objectives, including self evaluation, review and/or internal quality audit processes;
- **Program development and review** - The provider adequately and appropriately designs, develops and reviews its education and training qualifications, programs and courses;
- **Program delivery** - The provider defines and implements effective teaching and learning practices that are educationally sound and appropriate to the program of study and mode of delivery;

[34] ADB, *Technical-Vocational Skills Development in Samoa*, *Technical Assistance for Implementation of Pacific Education Strategy: Skills Development*, TA No. 6268-REG, prepared by Salā P.T.Lene, 2007.

- **Financial resources -** The provider allocates adequate financial resources to achieve the outcomes of its education and training programs;
- **Personnel -** The provider recruits, manages and develops its people to enable quality delivery of its education and training programs;
- **Learner information, entry and support** - Adequate and relevant information, entry and support services are provided to learners;
- **Physical and learning resources** - The provider has adequate and appropriate physical and learning resources to support the delivery of its education and training programs;
- **Assessment and moderation -** The provider has fair, valid and effective systems for assessing learners against the program outcomes;
- **Reporting learner achievement** - The provider adequately and appropriately reports learner achievement; and
- **Research** - Adequate and appropriate research is conducted to meet the requirements of degree and postgraduate qualifications and programs.

Source: *The SQA Quality Standard.*

PART IV: THE FINANCING OF TVET

CHAPTER 12. OVERVIEW OF TVET FINANCING

This chapter provides an overview of the latest available funding and expenditure estimates for the TVET sector, as it has been defined for this study. It begins with a summary of the funding of major providers of structured TVET programs, ones that lead to the award of certificates and diplomas, and is followed by a similar summary of expenditure patterns amongst these providers. A third section includes estimates of other funding and spending on less structured TVET programs, and canvasses what possibly could be omitted, in determining an overall estimate of the total funding allocated to the TVET sector in Samoa through public and private financial mechanisms.

Subsequent chapters in Part IV look in greater detail at financial mechanisms, at trends and patterns in funding and expenditure across the sector, and at unit costs of TVET delivery.

12.1 FUNDING OF TVET PROVISION

Table 12.1 brings together the estimates of funding in 2011-12 provided by the institutions themselves.[35] Together they indicate that in total just over WST 20 million of funding, from all sources, went in to the TVET sector in Samoa. Figures 12.1 and 12.2 highlight the composition of that estimated total, by institution and by source.

Table 12.1 Summary funding of TVET provision, 2011-12 (WST '000s)

	NUS TVET[1]	APTC[2]	Don Bos.	LPTC	UTVC	TIAS	Total priv.	Total	*% of total*
GoS grant	4,910	-	108	52	10	10	180	5,091	*25.1*
Development partner funding	-	12,153	-	-	-	10	10	12,163	*59.9*
Church support	-	-	130	216	63	-	409	409	*2.0*
Student fees	1,405	-	59	33	10	237	339	1,745	*8.6*
Industry contribution	74	-	-	-	-	-	-	74	*0.4*
Sale of services etc	243	10	66	-	-	-	66	319	*1.6*
Other sources	239	-	220	-	-	38	258	497	*2.4*
All sources	**6,872**	**12,163**	**582**	**301**	**84**	**295**	**1,262**	**20,297**	***100.0***
% of total	***33.9***	***59.9***	***2.9***	***1.5***	***0.4***	***1.5***	***6.2***	***100.0***	

1. Funding estimates for NUS operations previously grouped under IoT.
2. APTC also collects tuition fees directly from students.
Source: Material provided by institutions, see also Chapter 14

The salient features to emerge from Table 12.1 are:

- a marked imbalance, from a financial resources point of view, between the level of funding received by APTC's Samoan campus operations, and the concomitantly low level of resourcing available that year to the four mission and private TVET providers;
- Together, NUS's TVET operations and those of APTC, located on the same Le-Papaigalagala campus, account for around 94 per cent of the funding coming into the sector in 2011-12;

[35] The templates for recording information for this study that the institutions were asked to complete are given in Annexes 1 to 4.

- The funding pattern shown Figure 12.1 is in stark contrast to that in enrolments across the sector, as shown in Table 8.2, and the implications of this will be examined further in later chapters.

Table 12.2 Funding of TVET, by institution, 2011-12 (%)

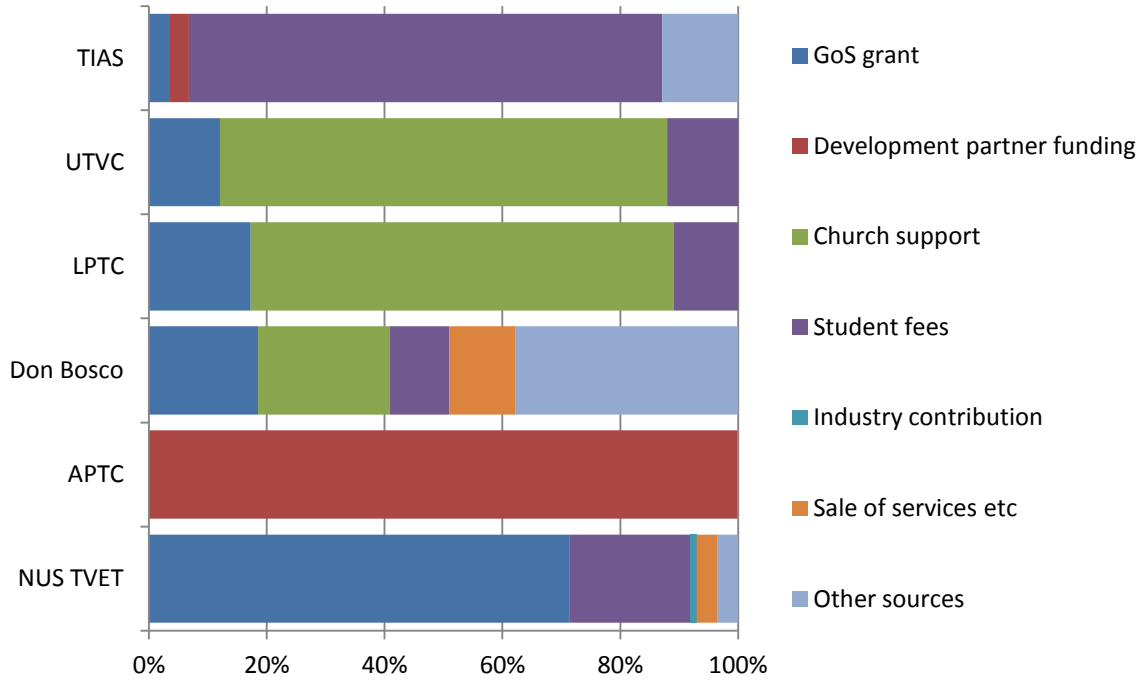
	NUS TVET	APTC	Don Bos.	LPTC	UTVC	TIAS	Total priv.	*Total*
GoS grant	24.2	0.0	0.5	0.3	0.0	0.0	0.9	*25.1*
Development partner funding	-	59.9	-	-	-	0.0	0.0	*59.9*
Church support	-	0.0	0.6	1.1	0.3	-	2.0	*2.0*
Student fees	6.9	0.0	0.3	0.2	0.0	1.2	1.7	*8.6*
Industry contribution	0.4	0.0	0.0	0.0	0.0	0.0	-	*0.4*
Sale of services etc	1.2	0.0	0.3	-	-	-	0.3	*1.6*
Other sources	1.2	0.0	1.1	-	-	0.2	1.3	*2.4*
All sources	**33.9**	**59.9**	**2.9**	**1.5**	**0.4**	**1.5**	**6.2**	***100.0***

Source: Table 12.1.

Figure 12.1 further highlights the TVET funding imbalance within the sector. Together development partner support and GoS appropriations contributed 85 per cent of the funds flowing in to the TVET sector in 2011-12. In contrast, student fees accounted for less than 9 per cent and industry, which elsewhere can be a significant source of TVET funding, provided less than one per cent.

The pattern of funding across institutions can be seen in Figure 12.2. Significant differences are apparent. APTC is all but fully funded by the Australian Government; NUS TVET is heavily dependent upon GoS appropriations; the two Methodist Education Board centres, LPTC and UTVC, rely on church funding, and TIAS depends upon student fees for most of its income; Don Bosco is not overly dependent upon any one source, but obtains funding in a variety of forms.

Figure 12.1 Funding of TVET, by institution and source, 2011-12 (% of total)



Source: Table 12.1.

12.2 EXPENDITURE ON TVET PROVISION

The patterns displayed in the funding of TVET in Samoa are mirrored in its expenditures. Table 12.2 presents the expenditure patterns in 2011-12 for each of the main formal TVET providers.

Table 12.3 Summary of expenditure on TVET provision, 2011-12 (WST '000s)

	NUS TVET[1]	APTC	Don Bosco	LPTC	UTVC	TIAS	Total priv.	Total
Recurrent expenditure								
Personnel emoluments	2,793	2,792	438	176	70	100	783	6,368
Operational expenses[2]	1,342	2,950	55	15	12	43	125	4,417
Total delivery of programs	**4,135**	**5,741**	**493**	**191**	**82**	**143**	**908**	**10,785**
Campus overheads	-	1,625	-	-	-	-	-	1,625
Institutional overheads	2,550	2,421	-	-	-	-	-	4,971
Total overheads	**2,550**	**4,047**	**-**	**-**	**-**	**-**	**-**	**6,596**
Total recurrent expenditure	**6,685**	**9,788**	**493**	**191**	**82**	**143**	**908**	**17,381**
Development expenditure[3]	96	-	-	-	-	95	95	191
Scholarship programs	200	2,237	-	-	-	-	-	2,437
Capital programs	258	137	76	100	-	44	220	616
Total expenditure	**7,239**	**12,163**	**569**	**291**	**82**	**282**	**1,223**	**20,626**

1. Expenditure estimates for NUS operations previously grouped under IoT.
2. Includes items such as consumables, utilities and maintenance.
3. Includes items such as staff development and developing new courses.
Source: Material provided by institutions; see also Chapter 14.

Table 12.4 Summary of expenditure on TVET provision, 2011-12 (%)

	NUS TVET[1]	APTC	Don Bosco	LPTC	UTVC	TIAS	Total priv.	Total
Recurrent expenditure								
Personnel emoluments	13.5	13.5	2.1	0.9	0.3	0.5	3.8	30.9
Operational expenses	6.5	14.3	0.3	0.1	0.1	0.2	0.6	21.4
Total delivery of programs	20.0	27.8	2.4	0.9	0.4	0.7	4.4	**52.3**
Campus overheads	0.0	7.9	0.0	0.0	0.0	0.0		7.9
Institutional overheads	12.4	11.7	0.0	0.0	0.0	0.0		24.1
Total overheads	12.4	19.6						**32.0**
Total recurrent expenditure	32.4	47.5	2.4	0.9	0.4	0.7	4.4	**84.3**
Development expenditure	0.5					0.5	0.5	0.9
Scholarship programs	1.0	10.8	0.0	0.0	0.0	0.0		11.8
Capital programs	1.3	0.7	0.4	0.5		0.2	1.1	3.0
Total expenditure	**35.1**	**59.0**	**2.8**	**1.4**	**0.4**	**1.4**	**5.9**	**100.0**

1. Expenditure estimates for NUS operations previously grouped under IoT.
Source: Material provided by institutions; see also Chapter 14.

Table 12.2 shows a similar pattern in expenditure as is observed in Figure 12.1 with respect to funding – APTC accounted for almost 60 per cent of the total, NUS TVET around one-third, and the remainder coming from the church and private providers.

Across the whole sector recurrent expenditure on TVET program delivery accounted for just over half of all spending (31 per cent on personnel and 21 per cent on operating expenditure). However, as is shown in Table 12.2, a further 32 per cent was estimated to be taken up by institutional and campus overheads, and another 12 per cent on scholarship programs, leaving only a very small proportion of funds available for development and capital works programs.

Expenditure patterns across institutions are displayed in Table 12.3 and Figure 12.2. Unlike in regard to sources of revenue, however, there is less variation between institutions in categories of expenditure. The salient features to emerge are:

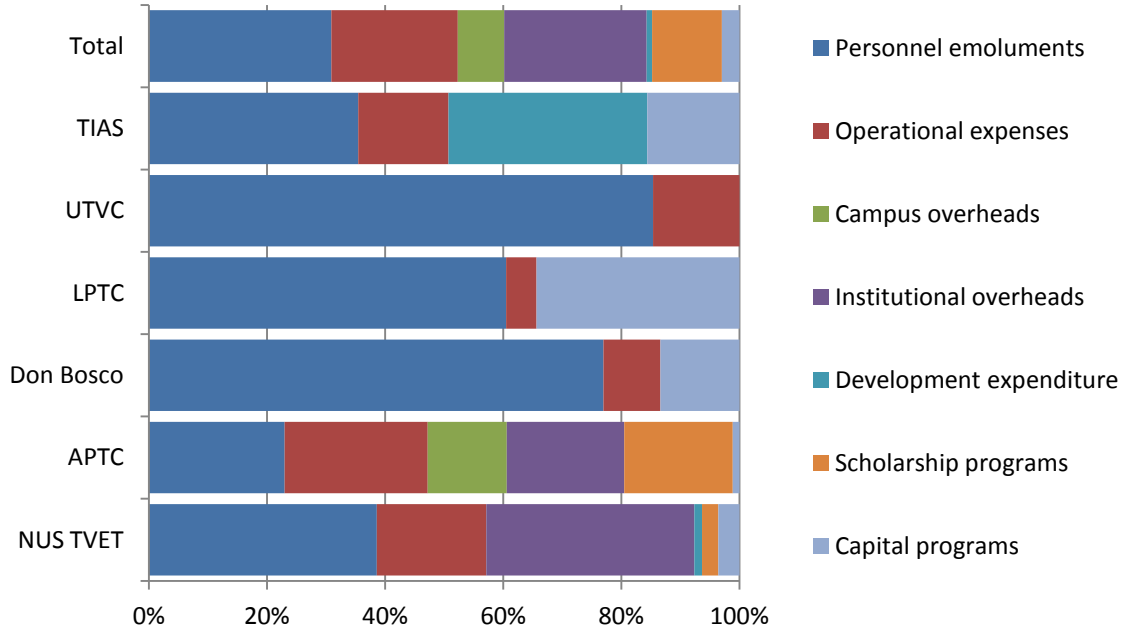
- It is only NUS TVET and APTC that have large overheads – the latter with both campus-level and institutional overheads. None of the private providers carry these costs.
- It is only NUS TVET and APTC that have formal scholarship programs explicitly provided for in their budgets
- TIAS was the only provider in 2011-12 that had a significant component of development expenditure.
- The proportion of annual budgets devoted to operating expenditure (on teaching materials, consumables, utilities, rent, etc) was not particularly large in any institution but, if anything, was smaller amongst the private providers.

Table 12.5 Summary expenditure on TVET provision, 2011-12 (WST '000s)

	NUS TVET[1]	APTC	Don Bosco	LPTC	UTVC	TIAS	Total priv.	Total
Recurrent expenditure								
Personnel emoluments	38.6	23.0	77.0	60.5	85.4	35.5	64.0	30.9
Operational expenses	18.5	24.3	9.7	5.2	14.6	15.2	10.2	21.4
Total delivery of programs	57.1	47.2	86.6	65.6	100.0	50.7	74.2	**52.3**
Campus overheads	0.0	13.4	0.0	0.0	0.0	0.0		7.9
Institutional overheads	35.2	19.9	0.0	0.0	0.0	0.0		24.1
Total overheads	35.2	33.3						**32.0**
Total recurrent expenditure	92.3	80.5	86.6	65.6	100.0	50.7	74.2	**84.3**
Development expenditure	1.3					33.7	7.8	0.9
Scholarship programs	2.8	18.4	0.0	0.0	0.0	0.0		11.8
Capital programs	3.6	1.1	13.4	34.4		15.6	18.0	3.0
Total expenditure	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

1. Expenditure estimates for NUS operations previously grouped under IoT.
Source: Material provided by institutions; see also Chapter 14.

Figure 12.2 Expenditure on TVET, by institution and source, 2011-12 (% of total)



Source: Table 12.1.

12.3 ESTIMATING THE SHARE OF GDP SPENT ON TVET

To arrive at an estimate of the total amount of resources devoted to TVET in Samoa it is necessary to factor in a number of items, for some of which only approximations can be given.

Estimates for the amount spent on non-structured short-course training programs need to be factored in, as should the cost of system regulation, quality assurance and apprenticeship program management. These estimates are included in the following figures. They are based on information contained in Chapters 13 and 14.

Estimates also need to be included of the amount that is spent annually by state-owned enterprises and private corporations on structured training of their employees. Table 12.6 includes a broad estimate of such expenditure. This estimate needs to be treated cautiously as it is based on the findings of a small pilot survey of some of the largest public and private enterprises in the country. The survey, its methodology and results are outlined in Chapter 15.

Table 12.6 Estimated expenditure on training beyond the formal TVET sector, 2011-12

Item	WST thousands (approx.)
Oloamanu Centre - Samoa In Country Training Program	960
USP Alafua Continuing and Community Education program	40
Estimated expenditure on short course training	**1,000**
Approximate enterprise-based training	2,500
PSET regulation and system QA, and apprenticeship management	3,354
Approximate additional spending on training	**6,854**

On the basis of these estimates an approximate WST 7 million can be added to the WST 20 million channelled through the major TVET providers (see Tables 12.1 and 12.2), bringing the total to around WST27 million for the funding of TVET in 2011-12. That is approximately 2.5 per cent of GDP

It could, however, be claimed that this figure overstates the amount spent on TVET in Samoa in 2011-12, because it includes the full costing of APTC operations, which in turn includes an apportioning of the cost of running the college's operations in its headquarters in Nadi, Fiji, and in Australia, none of which is actually expended in Samoa. That pro-rata overhead expenditure was calculated to be around WST 2.8 million for the year.

Moreover, as has been noted, APTC's operations in Samoa are decidedly regional in focus, with 150 of the 240 students enrolled in 2011-12 being from other countries in the region. If annual expenditure at APTC Samoa was adjusted to take account of the ex-Samoa element then an additional WST 6 million would need to be cut from the total, as shown in the figures below.

If these excisions we implemented that would bring the total resource allocation to Samoan TVET in 2011-12 back to around WST 19-20 million, or about two per cent of GDP. As shown in Table 12.7, this is comparable, or higher, to other Pacific Island Countries. Table 12.8 shows the share of public spending on education expressed as a percentage of GDP ranges between 4-5 per cent. It should be noted that the proportional spend on TVET relative to other sectors of education will vary across different countries and systems.

Table 12.7 Relative size of TVET budgets, selected Pacific countries

Pacific Island Countries	TVET as Share of GDP (%)	TVET as Share of MOE Expenditure (%)	MOE Expenditure as Share of Budget (%)	MOE Expenditure as Share of GDP (%)
Cook Islands	0.2	6	-	3
Fiji Islands	0.4 (a)	4	19	10
Kiribati	0.6 (b)	3	25	21
Marshall Islands	1.8 (c)	24 (d)	12 (e)	24
Micronesia	1.4	7	-	19
Palau	3.3 (f)	54 (g)	11	7
PNG	0.5 (h)	13	16	8
Solomon Islands (i)	3.5	40	25	9
Tonga	0.3	9	13	3
Tuvalu	-	-	23	-
Vanuatu	0.6	3 (j)	26	12

a. If the training and productivity authority of Fiji was included, this increases to 0.68.
b. Data for Tarawa Technical Institute only. If the Fisheries Training Centre and the Marine Training Centre are included, this figure rises to 2.0.
c. Includes the National Training Council, National Vocational Training Institute, and the business studies/computing part of the College of the Marshall Islands; however if only the National Training Council is included, then the figure is 0.5%.
d. Includes the National Training Council, National Vocational Training Institute, and the business studies/computing part of the College of the Marshall Islands; however if only the National Training Council is included, then the figure is 2.0%.
e. Pertains to government funds only, excludes external funds.
f. Palau Community College only, which also offers bachelor degree courses.
g. Ministry of Education expenditure here also includes external funding through the Compact.
h. Vocational centres and business technical colleges only. Excludes the National Training Council.
i. TVET reference is for all tertiary sectors so the actual TVET expenditure is much smaller.
j. Vanuatu Institute of Technology only; 6% for all TVET-related activities.

Source: ADB, 2008.

Table 12.8 Public spending on education, selected Pacific countries and international groups of countries, 2000 to 2009 (% of GDP)

Country Name	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Fiji	5.9	5.6	6.2	--	6.2	5.1	5.6	5.8	4.2	4.5
Kiribati	11.0	11.9	11.6	--	--	--	--	--	--	--
Papua New Guinea	--	--	--	--	--	--	--	--	--	--
Solomon Islands	--	--	--	--	--	--	--	5.9	6.1	8.0
Samoa	4.0	4.3	4.3	--	--	--	--	--	5.3	
Tonga	4.9	4.5	3.8	4.2	3.9	--	--	--	--	--
Vanuatu	7.0	9.0	8.2	8.5	--	--	--	---	6.6	5.2
World	**3.9**	**4.3**	**4.2**	**4.3**	**4.3**	**4.4**	**4.5**	**4.5**	**4.6**	**5.0**
OECD members	5.0	5.2	5.3	5.4	5.3	5.4	5.4	5.1	5.3	5.6
East Asia & Pacific (developing)	3.3	2.5	3.0	--	2.7	--	--	3.1	3.8	
Sub-Saharan Africa (developing)	3.5	3.7	3.4	3.7	3.9	4.1	--	--	3.8	--
Caribbean small states	4.4	4.8	4.8	4.3	3.9	4.6	--	5.3	5.9	6.0

Source: World Bank, 2013.

CHAPTER 13. TVET FINANCIAL MECHANISMS

13.1 OVERVIEW OF HOW FUNDS ARE CHANNELED INTO TVET

Figure 13.1 aims to encapsulate the complexity of financial flows into and between elements in the Samoan TVET system. Many of these flows, especially the more minor ones, and those to and between minor participants, were not well documented. Many of the flows emanate *from* the major funders - the MoF; Samoa's development partners (the principal one being the Australian Government); from parent bodies of the major private providers; and from students themselves in the form of fees - and *to* the major public, private and regional providers.

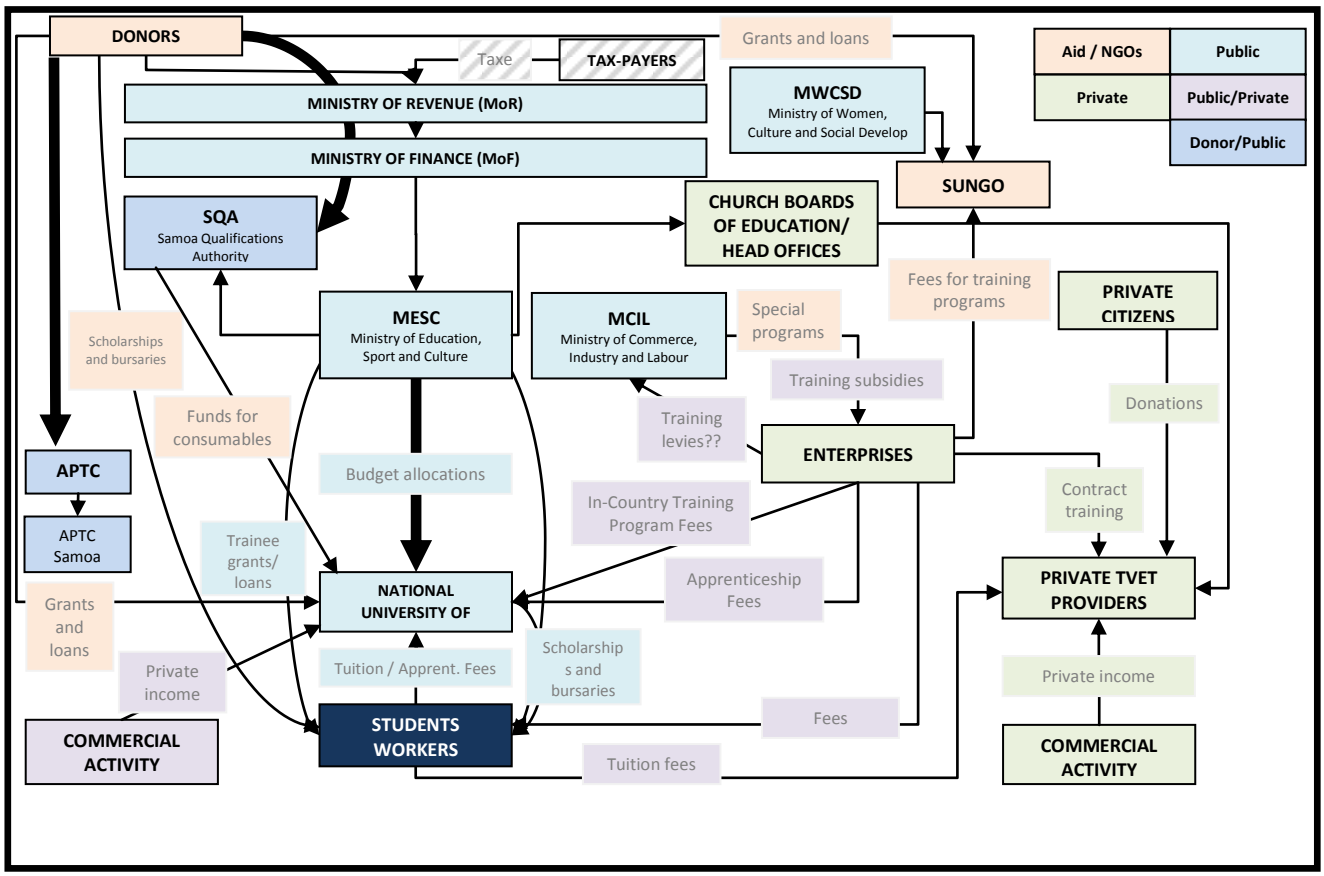
13.2 RECURRENT BUDGET PREPARATION AND DISBURSEMENT PROCESSES[36]

The overall responsibility for directing and coordinating national and sectoral planning, budgeting and resourcing in Samoa is with the MoF. Fiscal policy development is led by MoF's Economic Policy and Planning Division (EPPD), in consultation with other stakeholders through the Planning and Budget Committee (PBC) of Cabinet. MoF first adopted the output-based budgeting model in 1996/97, however, the annual recurrent budget preparation and allocation process can be typified as incremental-based, with an annual bidding process by competing line ministries, followed by a screening process by MoF and Cabinet. Linkages to national planning do not appear strong. Development budgeting, on the other hand, being entirely financed by donors, has stronger links to national planning and the Samoan Development Strategy (SDS).[37]

[36] The recent report submitted to AusAID by Charles Kendall and Partners in July 2012*, Assessment of the Education Sector's Public Financial Management Systems*, *Samoa Final Report,* in preparation for AusAID's proposed support for the new Education Sector Plan, is a useful source of information on the financial nexus between the MoF and the three education and training sector agencies. Much of what follows in this section is derived from this report.

[37] More recently, the GoS focus on sector wide approaches and sector planning is forging stronger links between planning and the recurrent budget, and between the development and recurrent budgets. Sector plans and sector plan costings now have a greater influence on budget allocations. Sector MTEFs are screened alongside ministry budget submissions during budget preparation. Sector level outcomes, ministry level outcomes and performance also now inform the budget allocation process (Kendall, page 21)

Figure 13.1 The flow of funds into and within the TVET sector in Samoa



Adapted from Ziderman 2003

It is MoF's Budget Division that has the responsibility for managing the annual budget cycle and the budget allocation process, in consultation with the EPPD Division, and the Aid Coordination and Debt Management Division. This is the division of MoF that is responsible for the production of the annual *Approved Estimates*.

Along with other public bodies (statutory authorities), NUS and SQA participate in the same budgetary processes as do line ministries – in respect to budget submissions, forward estimates and performance frameworks. As such, the assessed strength of their contributions to national and sector outcomes, and assessments of past performance, are contributing factors in determining the size of their annual allocations

Output-based budgeting allows senior management within line ministries considerable freedom in the internal allocation of resources. Within any given ministry, funds can be reallocated *across outputs* (subject to MoF approval), but the appropriation of a given output cannot be increased by more than 20 per cent. Within a given output, funds can also be reallocated *across input or resource groups* - personnel, operating and capital. In practice, however, MoF will not permit personnel funds to be reallocated within an output unless the ministry can demonstrate genuine savings in personnel. For ministries such as MESC, there are strict limits on the management of human resources, since they are subject to the civil service legal framework, managed centrally by the Public Service Commission (PSC).[38] Creation of new positions, or any restructuring that involves personnel, must be handled in close cooperation with PSC, who will ultimately approve any new structures or positions.

As public bodies NUS and SQA, however, differ in a number of respects from regular line ministries such as MESC. They each have their own board of governance, and they both have more financial autonomy than do line ministries – in tapping into non-budgetary funding sources and in greater flexibility in expenditure. Their different status to that of MESC is exemplified by their budget allocations for the coming year appearing in GoS *Approved Estimates* under that of MESC, as *'Outputs Provided by Third Parties: Grants and Subsidies*'. Bracketed here along with the NUS and SQA are grants and subsidies to private/mission schools, village school stationery (a larger annual grant than that to SQA) and the Samoa Sports Facilities Authority.[39]

The NUS has autonomy over recruitment, definition of roles, reassignment of resources etc. There are job descriptions for all positions. New positions have to be requested through the registrar to the Vice Chancellor, with justification and demonstration of funds available. Similarly, the SQA has authority over recruitment of personnel and is able to determine its own classification and salary structure. These are approximately one level higher than an equivalent ministry level position. CEO and ACEO salary levels for the SQA are the same as in the civil service.[40]

[38] Via the *Public Service Act 2004*, *Working Conditions & Entitlements 2009*, *Recruitment & Selections Manual 2995*, *Discipline Manual 2004*.

[39] See, for example, page 36 of the GoS *Approved Estimates* for 2012-13

[40] The NUS financial system is governed by Part VII of the National University of Samoa Act, 2006, and that of SQA by Part X of the Samoa Qualifications Authority Act. Both operate within the framework of the PFM Act Part XIII, the Public Bodies Act Part VI, and the Financial Policies and Procedures Manual, 2011

National University of Samoa

NUS is a dual-sector institution – it offers teaching and research programs within the higher education sector and teaching programs within TVET. Increasingly, since the merger of the Institute of Technology (IoT) into the university in 2006, the funding of and expenditure on the two elements have become increasingly integrated. It is fortunate, however, from the perspective of this study, that the MoF has, in its output-based approach to budgeting, retained the distinction. This has required NUS to submit budget proposals according to output categories that allow the TVET component of the university's operations to be identified. As Table 13.1 indicates, there are 14 outputs within NUS budgets, four of which can be considered TVET focussed (Output numbers11-14), as they derive from the old IoT activities. Budget allocations to NUS in total, and for these four outputs, over the period 2008-09 to 2012-13 are analysed in Chapter 14.

Table 13.1 Outputs of NUS for budgetary purposes

Output number	Output delivered by NUS
1	Policy advice to responsible Minister and Council
2	Policy advice to Vice-Chancellor and President
3	Director Secretariat
4	Counselling Services
5	Faculty of Business and Entrepreneurship
6	Faculty of Arts
7	Faculty of Education
8	Faculty of Nursing
9	Faculty of Science
10	Centre for Samoan Studies
11	Oloamanu Centre for Professional Studies and Continuing Education
12	School of Engineering
13	School of Business and General Studies
14	School of maritime Training

Source: *GoS Approved Estimates* for 2012-13, pages 300-302.

Budget planning in NUS begins about nine months before the start of the financial year, and is conducted over a series of resource allocation and 'planning and budget' meetings, by faculty, school and division heads and senior staff of the financial services division, to determine spending priorities across the university, and to allocate funds in accordance with the medium term goals and strategies of NUS.

Alternative draft budgets are considered by the Vice-Chancellor's Committee (VCC) before a final draft is submitted to the Finance Committee for its scrutiny, and for approval by Council. The agreed budget proposal is then submitted to MoF and hence to PBC of Cabinet for their deliberations.

Once the annual MoF grant is approved, a process of review according to institutional priorities, the extent to which alternative sources of funds have to be tapped and/or expenditure priorities need to be reordered, is revisited in the VCC, before a final NUS budget

for the coming year is submitted to the Finance Committee and Council for approval.[41] It is through this process that the resources for NUS's TVET activities for the year are determined.

Samoa Qualifications Authority

Table 13.2 shows that SQA has four outputs to be delivered and hence resourced. As with NUS, it has a degree of flexibility in shifting funding between outputs, less so between inputs, but any changes are subject to SQA Board and MoF approval. SQA's brief, however, extends across the whole of PSET, and neither its funding nor expenditures can be broken down between TVET and non-TVET components. All four outputs, therefore, are relevant to TVET.

Table 13.2 Outputs of SQA for budgetary purposes

Output number	Output delivered by SQA
1	Policy advice to responsible Minister and the Board
2	Quality assurance
3	Research policy and planning
4	Qualifications

Source: *GoS Approved Estimates* for 2012-13, page 256.

Ministry of Commerce, Industry and Labour Apprenticeship and Employment Services Division

Only one of the eight outputs delivered by MCIL, as shown in Table 13.3, is directly relevant to TVET funding – the administration of the apprenticeship scheme and employment services. MCIL's budget, however, also includes an additional line - the annual payment to NUS as the apprenticeship training provider.

Table 13.3 Outputs of MCIL for budgetary purposes

Output number	Output delivered by MCIL
1	Policy advice to responsible Minister and Council
2	Ministerial support
3	Management of investment promotion and industry development
4	Enforcement of fair trading and codex development
5	Faculty of Business and Entrepreneurship
6	Administration of apprenticeship scheme and employment services
7	Enforcement of occupational health, safety and health standards
8	Management of registries of companies, intellectual properties

Source: *GoS Approved Estimates* for 2012-13, pages 13-14.

[41] Budget spending is closely monitored by the Financial Services section of NUS, and monthly commitment reports are provided to all budget centres (faculties, schools, divisions, etc) for their information and review. Government monitoring of the budget is achieved through financial reports furnished to the MoF on a quarterly basis. Financial management of NUS is undertaken within the strict guidelines of its *Financial Policies and Procedures Manual* (last revised, March 2011). The policies and procedures put in place in the manual provide a transparent and consultative process for the control of budgetary spending. The process regulates the operational management of resources in a conservative manner to ensure the budgeted resources are always linked to teaching (including TVET) and research outputs. Regular and detailed reviews of expenditure levels and patterns are carried out to ensure and safeguard the NUS's financial stability and sustainability.

13.3 DEVELOPMENT PARTNER FUNDING MECHANISMS

Development budget appropriations are the responsibility of the Aid Coordination and Debt Management Division of MoF, acting in consultation with the Budget Division and EPPD. Development budget appropriations to TVET rely almost entirely on funds coming from development partners. In recent years it could be said that TVET has not been a major target of donor assistance to Samoa.

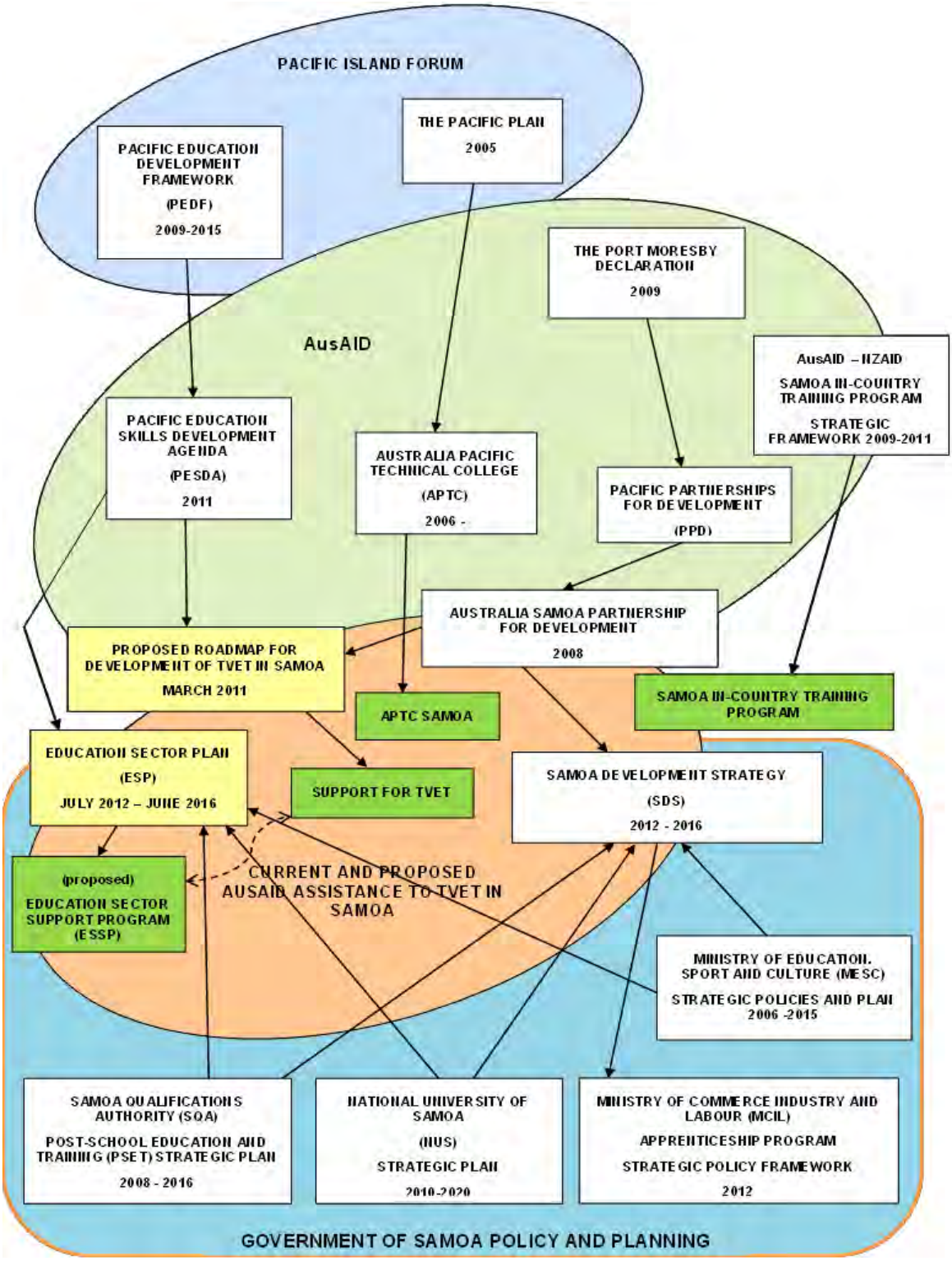
JICA funded a major infrastructure upgrade project at the old IoT between 2001 and 2006, prior to its merger with NUS. It involved the building/renewal of workshops, classrooms and administration blocks, renovation of facilities and the provision of new equipment.[42] Since then Australia has been the major development partner.

Australian Government assistance programs

At the time of writing, Australian assistance to the TVET sector consisted of two programs under the bilateral Australia-Samoa Partnership for Development, and one as part of the regional program under the Pacific Plan of 2005. TVET also features in a new initiative under the bilateral program that commenced in 2013. Figure 13.2 illustrates the policy framework in which Australian support for TVET in Samoa is conducted.

[42] The new NUS Act 2006 came into force in June, 2006 and in November 2006 the Government of Japan officially handed over to the Government of Samoa the newly completed Institute of Technology campus, which formed part of the JICA Project for the Upgrading and Extension of the former Samoa Polytechnic.

Figure 13.2 Policy and planning context for Australia's assistance to TVET in Samoa



Samoa In-Country Training Program (SICTP)

This is a jointly funded program between Australia and New Zealand that has been running since 1997. Originally confined to capacity building within government agencies and SoE, since 1999 it has been opened up to the private corporate sector and to non-government organisations (NGO). Since 2008 the program has been managed from within the country by a Program Coordinating Committee (PCC) consisting of representatives of the Public Service Commission (PSC), the Chamber of Commerce (CoC) and the Samoa Umbrella of Non-Government Organisations (SUNGO). Short-course training in practical skills under SICTP is conducted through the Oloamanu Centre in NUS.

Table 13.1 provides an illustration of the types of 5-day training courses funded under SICTP.

Table 13.4 SICTP 5-day courses, October-November 2012

Program	Requesting agency
Project Planning & Management for Construction Works	MWTI
Web Design & Portal Design	PSC
Intellectual Property as a Tool for Development & The Enforcement of IP Rights	MCIL
Civil Litigation Skills and Case Management	AG
Preliminary Environment Assessment Report	MNRE
Survey Report Writing	SBS
Wastewater Management	MNRE
Work Alignment	PSC
HRC Conflict Management	PSC
Basic Accounting for Non Accountants	CoC
Community Funding	SUNGO
Media & Publication Skills	SUNGO
Internet Marketing Skills	SHA
Project Management/Asset Management	NHS
Children's Services & Safety	SUNGO
Water Meter Calibration, Repair, Reading & Replacement	SWA
Bar Service Skills Training	SHA
Advanced Accounting for Non Accountants	CoC
Liquidation and Receivership	SIA
Report Writing	SUNGO
Management Training for Health Professionals	NHS

Source: http://www.samoaictp.ws

At the time of writing, the Australian Government allocated around WST 900,000 to the SICTP. The PCC submits a planned budget for the coming financial year and provides an annual report to the development partners.

Support for TVET Program

This is a three-year program that began in 2011-12, under the Samoa-Australia Partnership for Development. It is administered by SQA, who is responsible for submitting an annual program and budget. The first year's (2011-12) proposal was for expenditure amounting to WST 1.57 million. Whilst designated as support for TVET, in reality only a portion of this program is devoted exclusively to supporting the provision of TVET. For the most part it covers the wider gamut of post-secondary education and training and its regulation by SQA.

APTC – Samoa Campus

APTC is funded by the Australian Government under its regional program. As such it does not directly fall under the aegis of the Aid Coordination and Debt Management Division of MoF, and its budget is not included under that of the Samoa-Australia Partnership for Development. Financial matters relating to the Samoa campus operations of APTC are conducted through the college's Nadi office.

Samoa Education Sector Support Program (ESSP)

ESSP is the successor to the AusAID/NZAID/ADB Education Sector Plan (ESPII) that ended in 2013. It is delivered through a sector budget support modality in line with the government's approach to education planning and development. Under this approach, and through this modality, MECS, NUS and SQA are funded and supported by their development partners. Each agency draws up its plans and budget proposals, and these are coordinated through a Sector Coordination Division (SCD) located within the MESC.

13.4 PRIVATE PROVIDERS OF TVET

Don Bosco Samoa

Don Bosco Samoa (DBS) operates two TVET centres in Samoa:

Don Bosco Technical Centre, Alafua (Upolu)
Don Bosco High School and Vocational Centre, Salelologa (Savai'i)

DBS is an outreach of the Salesians of Don Bosco of the Australia Pacific Province, whose headquarters are located in Melbourne. It has been providing support to Samoa for almost 30 years. The Province coordinates and funds their work through their Australian Salesian Mission Overseas Aid Fund (ASMOAF). The Fund is officially registered in Australia as an overseas aid organisation by the Salesian Society (Vic) Inc.

The first technical centre was established in Alafua in 1988 with financial assistance from Australian donors and the second was established in Salelologa with financial assistance from German donors. Both schools are considered independent units from their Melbourne-based provincial headquarters.

As such, operational responsibility is devolved to the principals of each school. Each school pays their own staff and maintain their own records and accounts. Monthly profit and loss statements are reported to the governing council and monitored by a Melbourne-based business manager. The established campus at Alafua maintains financial records in Excel which is considered to be fit for purpose at this stage.

The Provincial Council of the Salesian Society in Australia is the Governing Board of ASMOAF and is responsible for the administration of the Fund. Most projects are directly targeted at young people and many have an educational focus. Recurrent funds from the Australia-Pacific Province are disbursed to the two technical centres based on historical enrolment trends and annual review of operations. Generally, contributions from external donors, public and private, are required for larger capital projects.

Recent examples of financial assistance for capital projects include the new electronics workshop at Alafua opened in August 2012. The materials for the workshop were funded by JICA. Sr Monika Vaipuna, the Principal of Don Bosco, undertook the planning application process in collaboration with a JICA volunteer based at Alafua.

The past three years have been characterised by an increasing level of interaction between Salesian schools in Australia and Samoa prompted by fundraising efforts to assist the newly established school at Salelologa. New tools and equipment are provided, either bought or donated, to the schools sporadically and when funds are available. A key issue for the Province has been the effect of currency fluctuations over the duration of school construction in Salelologa which has caused shortfalls in available funds. These shortfalls have been met by the church.

Methodist Board of Education of Samoa

Methodist Board of Education of Samoa manages two TVET centres:

Laumua o Punaoa Technical & Vocational Centre (LPTC)
Uesiliana Technical & Vocational Centre (UTVC)

The centres have little financial autonomy or discretionary powers with respect to fees and other income generating activities, or in spending programs.

Tesese Institute of Administrative Studies

Tesese Institute of Administrative Studies (TIAS) is a private for-profit TVET provider. It relies overwhelmingly on student fees to finance its operations. Government grant assistance is minimal.

CHAPTER 14. TVET FINANCIAL PATTERNS AND TRENDS

Chapter 12 identified the major parameters of funding and expenditure patterns across the three sub-sectors of TVET in Samoa. In this chapter each in turn is analysed, beginning with the contribution to the funding of TVET made by the Government of Samoa through its annual budget allocations.

14.1 GOVERNMENT OF SAMOA BUDGETARY ALLOCATIONS TO TVET

Annual budget allocations for recurrent purposes

GoS contributes to the funding of the recurrent expenditure on TVET, through its annual appropriations via MESC to NUS and to SQA, and to private TVET providers through its grants to mission schools. Table 14.1 presents the annual recurrent allocations across the key categories of expenditure.

Table 14.1 GoS recurrent allocations to the education sector, 2009-10 to 2012-13 (WST millions)

Item	2009-10	2010-11	2011-12	2012-13	av. annual % change 2009-10 to 2012-13
Total Government Expenditure					
Statutory payments	75.35	71.05	76.03	76.44	1.1%
Expenditure programs	383.13	437.88	430.95	454.97	5.1%
Unforeseen payments	11.49	13.14	12.93	13.65	5.1%
Total recurrent expenditure	**469.96**	**522.07**	**519.91**	**545.05**	4.5%
Annual Grant to Ministry of Education, Sports and Culture	**68.57**	**85.42**	**86.93**	**84.92**	6.8%
Grants and subsidies from MESC budget					
Private/mission schools[1]	5.00	5.00	5.00	5.00	0.0%
NUS	9.88	11.43	11.59	11.57	5.0%
SQA	1.39	1.65	1.77	2.10	13.9%
TVET component of NUS	3.19	3.53	3.50	2.96	-2.3%
as a percentage of total government program expenditure					
MESC	*17.90%*	*19.51%*	*20.17%*	*18.66%*	
Private/mission schools	*1.31%*	*1.14%*	*1.16%*	*1.10%*	
NUS	*2.58%*	*2.61%*	*2.69%*	*2.54%*	
SQA	*0.36%*	*0.38%*	*0.41%*	*0.46%*	
TVET component of NUS	*0.83%*	*0.81%*	*0.81%*	*0.65%*	
as a percentage of total MESC allocation					
Private/mission schools	*7.29%*	*5.85%*	*5.75%*	*5.89%*	
NUS	*14.41%*	*13.38%*	*13.33%*	*13.63%*	
SQA	*2.03%*	*1.93%*	*2.03%*	*2.47%*	
TVET component of NUS	*4.65%*	*4.13%*	*4.03%*	*3.48%*	

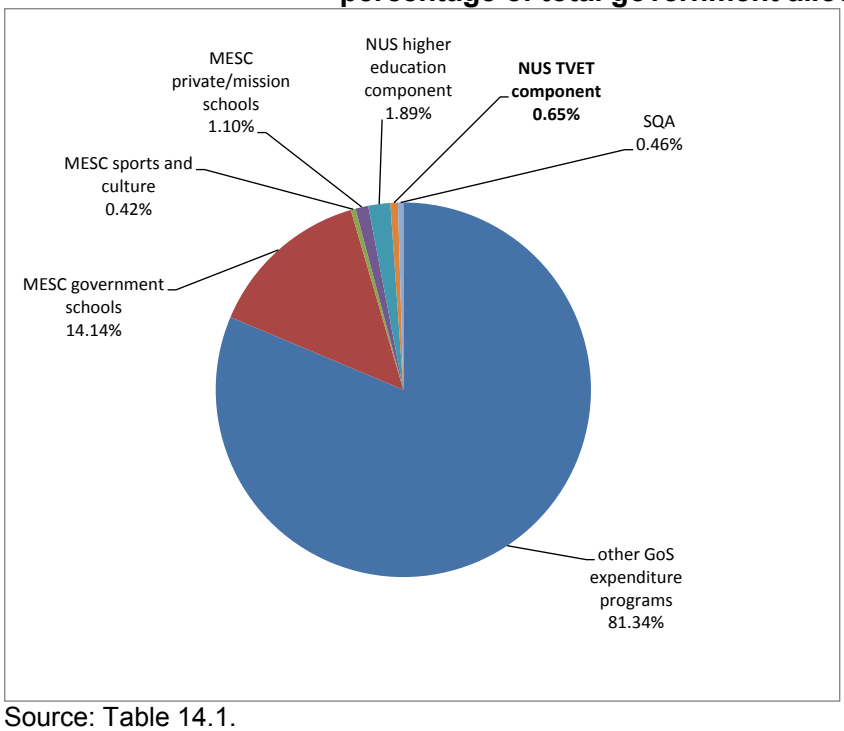
1. This is a grant provided to non-government schools (TVET and mainstream academic); it overestimates the amount which flows solely into TVET provision.
Sources: GoS *Parliamentary Paper No.2* for the years 2008-09 to 2012-13.

The salient features to emerge from Table 14.1 are:

- While over the four-year period 2009-10 to 2012-13 MoF annual recurrent expenditure estimates increased on average by five per cent per annum, the estimates for the various TVET recipients had quite different trajectories. The TVET component of NUS has declined as did the share allocated to mission and private providers. In contrast, the funding for SQA increased overall by around 14 per cent per annum.
- Annual MoF recurrent budget appropriations for the entire education and training sector are channeled through MESC, and run to between 18 and 20 per cent of total annual recurrent budget appropriations - between two and three per cent of which flow on to NUS for all its operations. Appropriations for its specifically TVET related outputs, and for SQA, both accounted for less than one per cent of the total annual GoS recurrent budget. Grants to all mission schools, for distribution not just to TVET centres run by the churches, are barely above that figure.

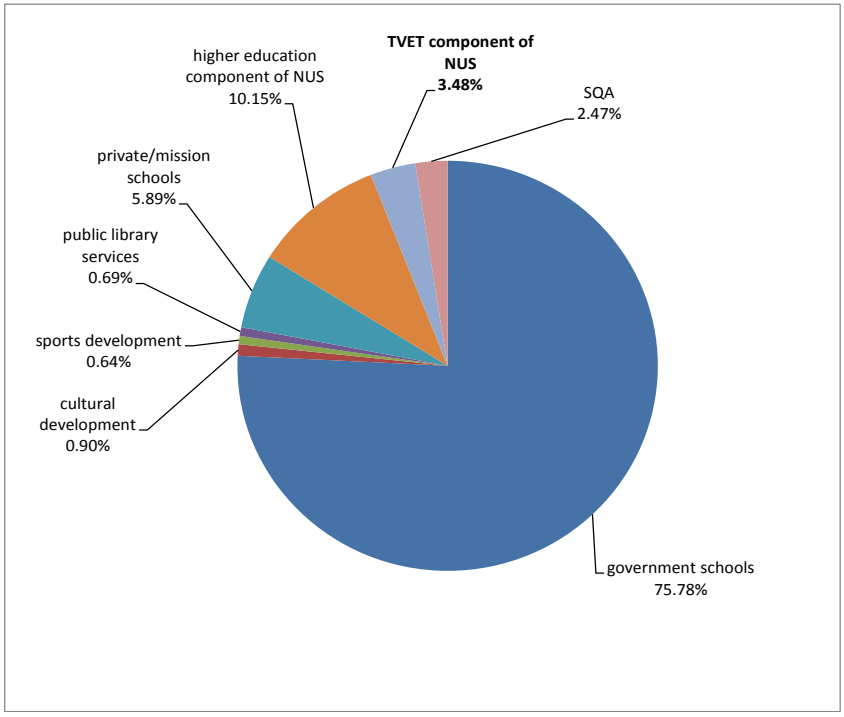
Figure 14.1 graphically illustrates how comparatively small the TVET sector allocations are for annual recurrent expenditures, in terms of the overall GoS annual budget estimates. Figure 14.2 does the same in the context of the amount appropriated to the whole education and training sector through MESC.

Figure 14.1 GoS recurrent expenditure allocations to the education sector, as a percentage of total government allocations, 2012-13



Source: Table 14.1.

Figure 14.2 Recurrent expenditure allocations within the education and training sector, 2012-13



Source: Table 14.1.

In determining the total allocations to be made to TVET for annual recurrent purposes, MoF applies the same procedure that it does to all other line ministries and agencies that are recipients of such grants namely,: it makes estimates of recurrent expenditures for the coming year (based on submissions), deducts amounts it estimates will be cost recovered (through fees, sales of services, etc) then adds in any funding from donors earmarked for recurrent purposes. These calculations are shown for the latest year 2012-13 in Table 14.2.

The output budgeting approach to annual budgeting that MoF employs allows the TVET components of NUS, SQA and MCIL appropriations to be identified. In Table 14.2 these outputs are grouped according to whether they relate to (a) the provision of certificate and diploma programs, (b) train-the-trainer programs, (c) short-course continuing education programs, or (d) TVET regulation and quality assurance. What is missing from here is the amount of government assistance that private TVET providers receive out of the mission school grant administered by MESC. That apart, the total allocation to TVET in 2012-13 was WST 7.27 million, of which WST 6.44 million or 89 per cent was MoF's estimate for recurrent expenditure.

Table 14.2 GoS annual recurrent grant estimates for TVET, by function, 2012-13 (WST millions)

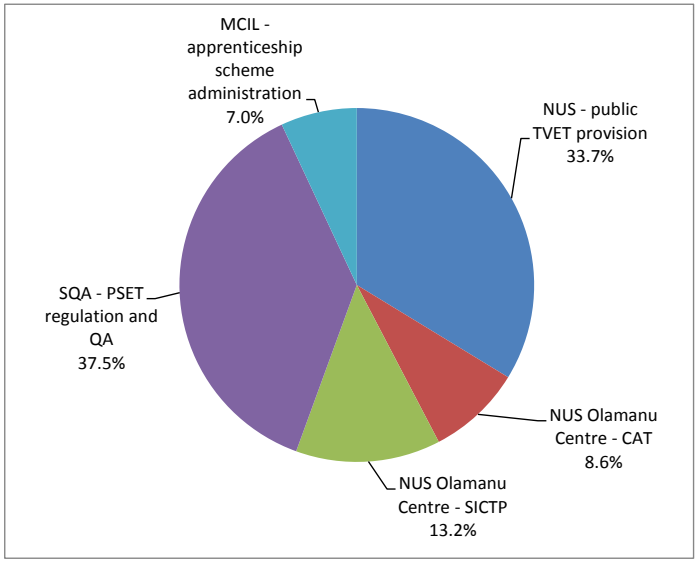
	total recurrent	cost recovery	net	donor cash funded	total approp.
NUS TVET TRAINING PROVISION					
NUS School of Engineering	1.72	0.43	1.29	-	1.29
Apprenticeship program delivery (via MCIL)	0.12	-	0.12	-	0.12
Total NUS School of Engineering	1.84	0.43	1.41	-	1.41
NUS School of Maritime Training	0.82	0.12	0.71	-	0.71
Total NUS Faculty of Applied Science	**2.67**	**0.55**	**2.12**	**-**	**2.12**
NUS School of Business and General Studies	0.87	0.53	0.34	-	0.34
Total NUS Faculty of Bus and E'ship	**0.87**	**0.53**	**0.34**	**-**	**0.34**
Total NUS TVET provision	**3.53**	**1.08**	**2.45**	**-**	**2.45**
OLOAMANU CENTRE FOR PROFESSIONAL AND CONTINUING EDUCATION					
Train-the-trainer (CAT) program	0.63	-	0.63	-	0.63
Samoa in-country training program (SICTP)	-	-	-	0.96	0.96
Total Oloamanu Centre	**0.63**	**-**	**0.63**	**0.96**	**1.59**
Total NUS TVET ACTIVITIES	**4.16**	**1.08**	**3.08**	**0.96**	**4.04**
GOVERNMENT TVET REGULATION AND QUALITY ASSURANCE					
SQA	1.77	*	1.77	0.95	2.73
MCIL apprenticeship division	0.51	-	0.51	-	0.51
Total Regulation and QA	**2.28**	**-**	**2.28**	**0.95**	**3.23**
TOTAL MoF ALLOCATIONS TO TVET	**6.44**	**1.08**	**5.36**	**1.91**	**7.27**

* SQA does charge fees for registration, accreditation and audits.
Source: GoS *Parliamentary Paper No.2*, 2012-13.

Figures 14.3 and 14.4 indicate how MoF budget appropriations for TVET operations are distributed.

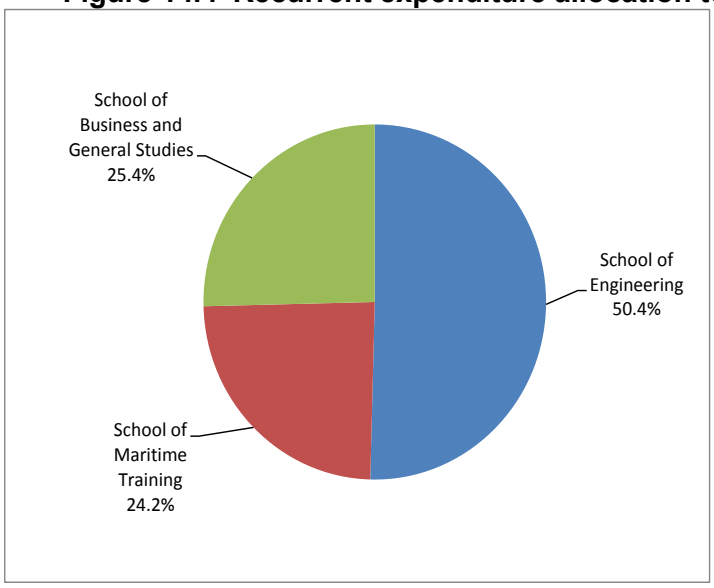
Figure 14.3 shows that regulation and quality assurance, through SQA and MCIL, accounted for almost 45 per cent of the total, well above the 34 per cent allocated to NUS for the delivery of TVET programs. The remainder, 22 per cent, went to the Oloamanau Centre at NUS for the conduct of professional development programs for TVET practitioners. Figure 14.4 presents the recurrent budget allocation for 2012-13 amongst the three areas of TVET delivery within NUS. Just on half was allocated to the School of Engineering within the Faculty of Applied Science, the remainder was distributed almost evenly between the School of Maritime Studies, within the same faculty, and the programs that were formerly offered under the School of Business and General Studies.

Figure 14.3 Recurrent expenditure allocations for TVET, by agency and function, 2012-13



Source: Table 14.2.

Figure 14.4 Recurrent expenditure allocation to NUS for TVET delivery, 2012-13



Source: Table 14.2.

In making its final annual recurrent allocations to government ministries, agencies and public bodies, MoF makes an assessment of their cost recovery capacity for the coming year, based on previous experience. Cost recovery for education and training programs generally is in the form of tuition fees but also through the sale of products and services. The estimates MoF made for the TVET delivery and regulatory agencies for 2012-13 are shown in Table 14.3.

Table 14.3 MoF estimates of cost recovery amongst TVET agencies, 2012-13

NUS TVET certificate programs	
School of Engineering	25.2%
School of Maritime Training	14.4%
School of Business and General Studies	61.2%
Average all NUS TVET certificate programs	**30.6%**
NUS Olamanu Centre - both for CAT and SICTP	0.0%
Average all NUS TVET programs	**26.0%**
TVET regulation and quality assurance	
SQA	0.0%
MCIL administration of Apprenticeship Scheme	0.7%
Average all public TVET operations	**16.8%**

Source: Table 14.2.

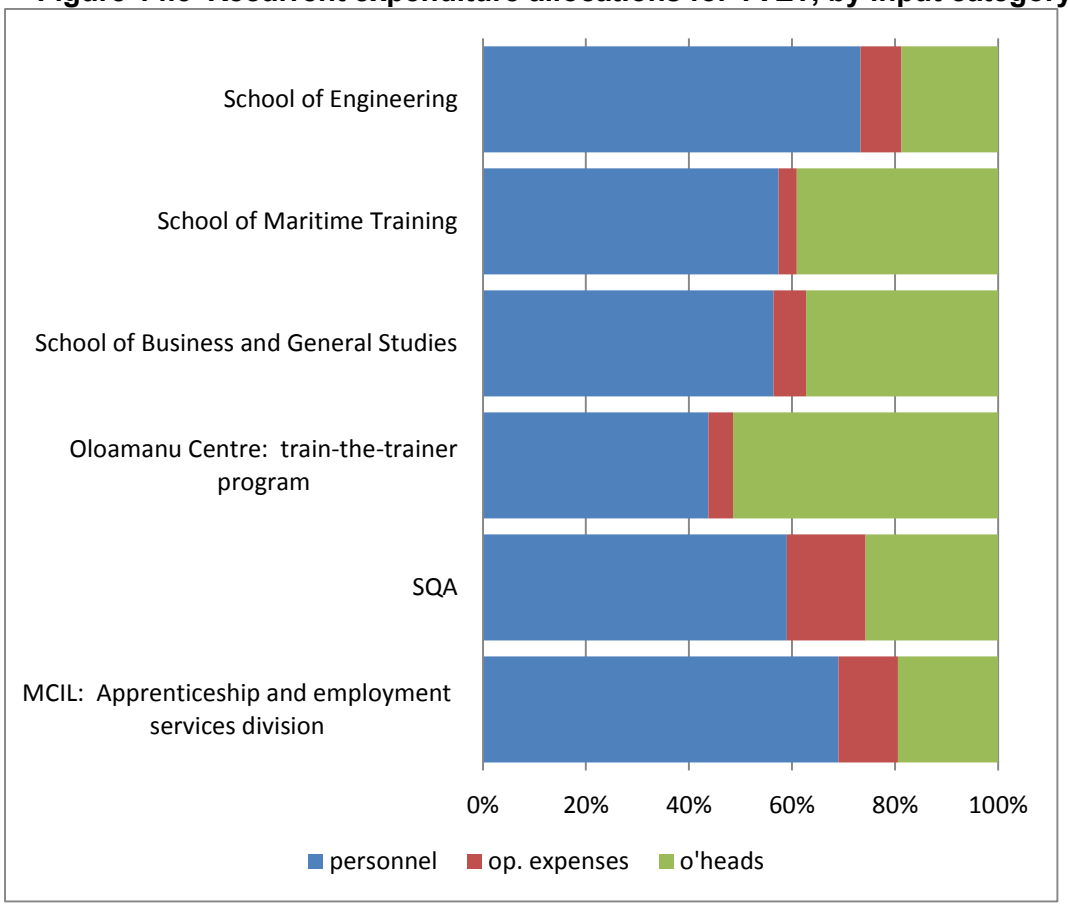
Table 14.4 GoS recurrent expenditure estimates for TVET, by function, 2012-13 (WST millions)

	personnel	operating expenses	direct recurrent	o'heads	total recurrent
PUBLIC TVET TRAINING PROVISION					
NUS School of Engineering*	1.26	0.14	1.40	0.32	1.72
NUS School of Maritime Training	0.47	0.03	0.50	0.32	0.82
Total NUS Faculty of Applied Science	**1.73**	**0.17**	**1.90**	**0.65**	**2.54**
NUS School of Bus. and General Studies	0.49	0.06	0.54	0.32	0.87
Total NUS Faculty of Bus and E'ship	**0.49**	**0.06**	**0.54**	**0.32**	**0.87**
Total NUS TVET provision	**2.22**	**0.22**	**2.44**	**0.97**	**3.41**
OLOAMANU CENTRE FOR PROFESSIONAL AND CONTINUING EDUCATION					
Train-the-trainer (CAT) program	0.27	0.03	0.30	0.32	0.63
Samoa in-country training program (SICTP)**					
Total Oloamanu Centre	**0.27**	**0.03**	**0.30**	**0.32**	**0.63**
Total NUS TVET ACTIVITIES	**2.49**	**0.25**	**2.75**	**1.29**	**4.04**
GOVERNMENT TVET REGULATION AND QUALITY ASSURANCE					
SQA	1.05	0.27	1.32	0.46	1.77
MCIL AES division	0.35	0.06	0.41	0.10	0.51
Total Regulation and QA	**1.40**	**0.33**	**1.73**	**0.56**	**2.28**
TOTAL MoF ALLOCATIONS TO TVET	**3.89**	**0.58**	**4.47**	**1.85**	**6.32**

* The MCIL budget appropriation also has an additional WST 0.12 million payment to NUS as the apprenticeship training provider (see Table 14.2).
** No breakdown is available for SICTP funding (see also Table 14.2).
Source: GoS *Parliamentary Paper No.2*, 2012-13.

MoF recurrent expenditure estimates have three components – personnel (staff remuneration and other emoluments), operating expenses (costs of consumables and other supplies, utilities, rentals, etc, directly related to the specific output) and a share of institutional overheads. Estimates for 2012-13 are set out in Table 14.4, and the relative weight of each in each of the TVET agencies are shown in Figure 14.5.

Figure 14.5 Recurrent expenditure allocations for TVET, by input category, 2012-13



Source: Table 14.4.

What is apparent from Figure 14.5 is just how squeezed operating expenditure allocations are between the imperative of allocating sufficient funds to cover personnel expenses and the funding of a share of institutional overheads. Figure 14.5 also reveals that the relative size of overheads tends to be greater in the TVET delivery agencies than it is in the regulatory agencies.

Annual budget allocations for development purposes

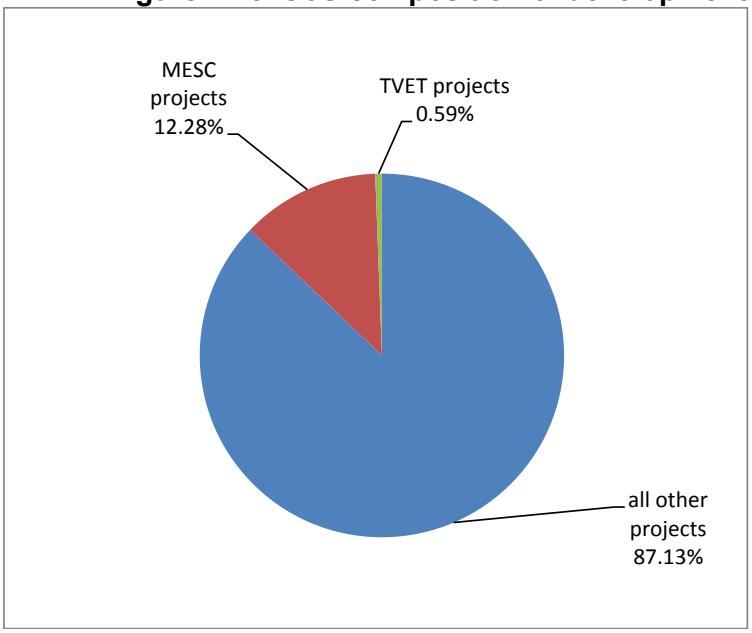
The government's development budget is entirely funded by international development partners, and has been running at over WST 300 million annually for most of the last four years. As Table 14.5 shows, the biggest component, 64 per cent, is grant assistance, either cash or in-kind, with soft-term loans contributing the remaining 36 per cent.

Table 14.5 GoS development program expenditure, 2009-10 to 2012-13 (WST millions)

	2009-10	2010-11	2011-12	2012-13
All ministries and departments				
foreign capital project grants	152.80	123.85	127.71	153.32
foreign soft term loans	172.00	149.08	108.76	116.85
in-kind donor assistance	-	51.97	41.04	56.24
total development estimate	**324.80**	**324.90**	**277.50**	**326.41**
Education, Sports and Culture				
foreign capital project grants	23.60	19.63	22.25	18.54
foreign soft term loans	2.00	5.00	4.56	6.90
in-kind donor assistance	-	15.64	22.86	14.65
total MESC development estimate	**25.60**	**40.26**	**49.66**	**40.09**
TVET related ODA				
total TVET related assistance	**3.35**	**1.91**	**3.59**	**1.91**

Sources: GoS *Parliamentary Paper No.2* for the years 2009-10 to 2012-13.

Figure 14.6 GoS composition of development program funding, 2012-13



Source: Table 14.5.

As Figure 14.6 shows, the education sector was the recipient of around WST 40 million (12 per cent) of this assistance, mostly in the form of grants. However, less than WST 2 million of that, or only 0.6 per cent found its way to the TVET sector. This does, of course, understate the contribution development partners make to the sector, because it excludes the assistance provided through the operations of APTC. This assistance falls under the Australian Government's regional program, and does not get recorded as part of its bilateral assistance to Samoa under the Australia Samoa Partnership for Development.

Even within the bilateral aid program assistance to the TVET sector in Samoa, Australia is the largest development partner, as is evident in Table 14.6, with New Zealand as the only other contributor – through its association with Australia in the SICPT. JICA also made a substantial contribution to TVET through the NUS project.

Table 14.6 TVET related development program expenditure, 2008-09 to 2012-13 (WST millions)

	Agency	Donor	2008-09	2009-10	2010-11	2011-12	2012-13
TVET related ODA							
Strengthening SQA	SQA	Aus	4.56	0.80	-	-	-
TVET support program	SQA	Aus	-	-	-	2.00	0.95
SICTP	NUS	Aus& NZ	1.75	2.55	**1.91**	1.59	0.96
Total TVET related assistance			**6.31**	**3.35**	**1.91**	**3.59**	**1.91**

Sources: GoS *Parliamentary Paper No.2* for the years 2008-09 to 2012-13.

14.2 NUS REVENUE AND EXPENDITURE

NUS is the sole public provider of TVET programs in Samoa but, as has been noted, it is also a dual-sector institution, conducting alongside these a range of higher education teaching and research programs. Since the merger in 2006 of the Samoa Polytechnic into the university in 2006 as the Institute of Technology and the subsequent dissolving in 2009 of IoT and IHE into a single entity, the financial integration of the higher education and TVET components has made it increasingly difficult to distinguish the funding of and expenditure on one from the other. The practice, maintained up until at least the preparation of the 2012-13 budget estimates, of MoF retaining the old IoT schools as NUS outputs in its deliberations and formulations has helped. So too has the inclusion of the Schools of Engineering and Maritime Studies in a separate Faculty of Applied Science, but much of the financial and human resource management of the university has been consolidated. This section of the study relies on unpublished information provided on request by the NUS Director of Financial Services, and his department.

Revenue sources

NUS is a public body and, as such, has a greater degree of flexibility in arranging its finances than has a line ministry such as MESC. Table 14.7 shows whilst the annual MoF appropriations are the same as those published in the *Approved Estimates,* the extent of the other financial resources it has at its disposal exceed the cost recovery estimates of the MoF. So much so that whereas the MoF estimates total recurrent expenditure for 2012-13, for example at WST 11.6 million (see Table 14.1), NUS project it to be at around WST 19.7 million. In the same year NUS revenue projections for its TVET operations were WST 4.25 million, compared to the MoF estimate of WST 4.04 million.

Table 14.7 NUS revenue sources, 2011-12 and 2012-13 (WST millions)

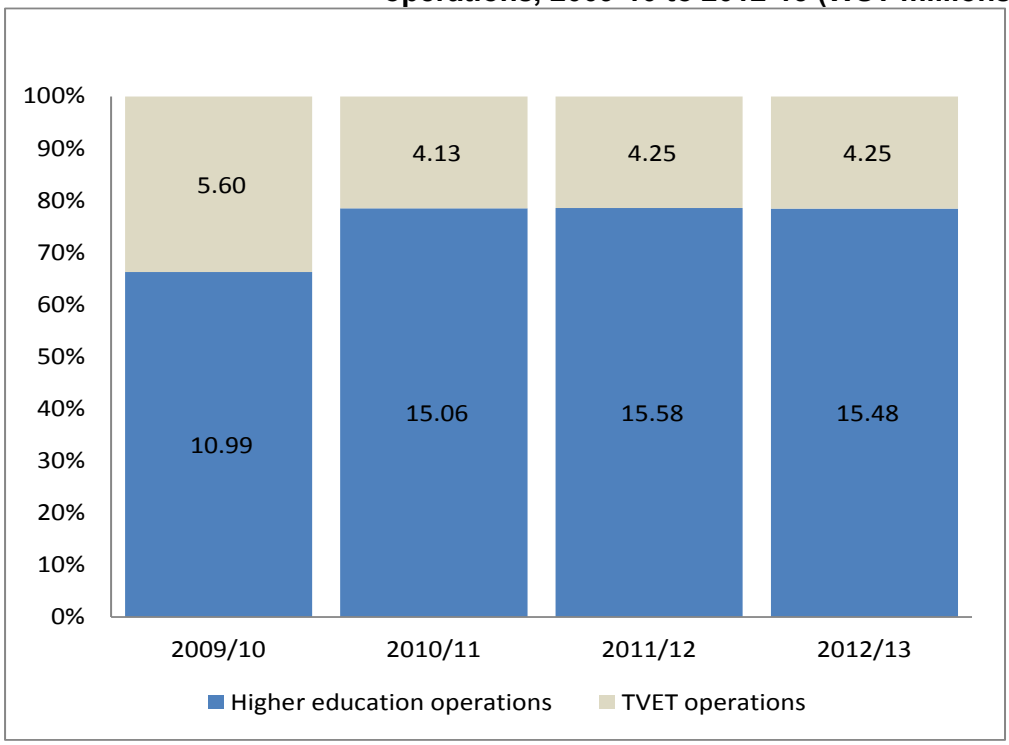
Source of funds	2011-12	2012-13	*2012-13 projected (%)*
	actual	projected	
Annual Ministry of Finance appropriations			
earmarked for TVET operations	2.36	2.36	*12.0*
all other MoF appropriations	9.23	9.22	*46.7*
Total MoF annual appropriations	**11.59**	**11.57**	***58.6***
Direct funding (ODA) from international donors			
earmarked for TVET operations	-	-	*0.0*
all other direct donor assistance	0.11	0.01	*0.1*
Total direct ODA funding	**0.11**	**0.01**	***0.1***
Income from student fees			
from TVET program students	1.41	1.44	*7.3*
from other NUS students	4.65	4.76	*24.1*
Total student fees	**6.05**	**6.20**	***31.4***
Revenue from the sale of services or products			
from TVET operations	0.24	0.17	*0.9*
from other NUS activities	0.80	0.58	*2.9*
Total revenue from sales	**1.05**	**0.75**	***3.8***
Other revenue sources			
related to TVET programs	0.24	0.28	*1.4*
other sources	0.79	0.92	*4.7*
Total other sources	**1.03**	**1.20**	***6.1***
Total annual funding of TVET operations	**4.25**	**4.25**	
Total annual NUS funding - all sources	**19.83**	**19.73**	***100.0***

Source: Material provided by NUS.

Revenue earmarked for, generated by or otherwise related to, its TVET operations accounts for around 22 per cent of the total NUS revenue pool projected for 2012-13, and this is approximately the same as the actual proportion in 2011-12. As Table 14.7 shows, even though there were small changes in funding sources they tended to be compensated for and offset each other, so that the amount devoted to TVET operations is projected to remain the same.

The stability of the funding shares of TVET and higher in NUS is graphically illustrated in Figure 14.7. It shows that the percentage going to each has remained virtually identical since the IOT and IHE were abolished in 2009. This figure also shows that, at the transition, NUS's higher education operations had a significant injection of funds, and that the reverse was the experience for the university's TVET programs.

Figure 14.7 The breakdown of NUS revenue between its higher education and TVET operations, 2009-10 to 2012-13 (WST millions)

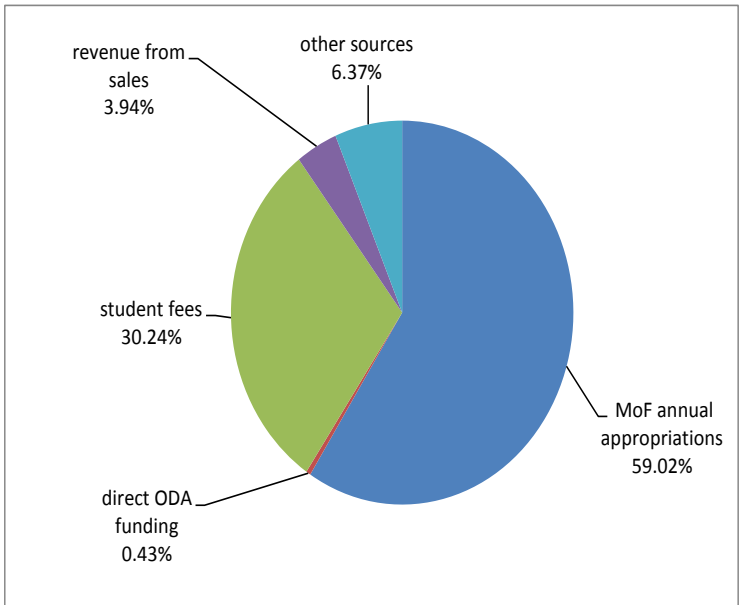


Source: Table 14.7 and additional material supplied by NUS.

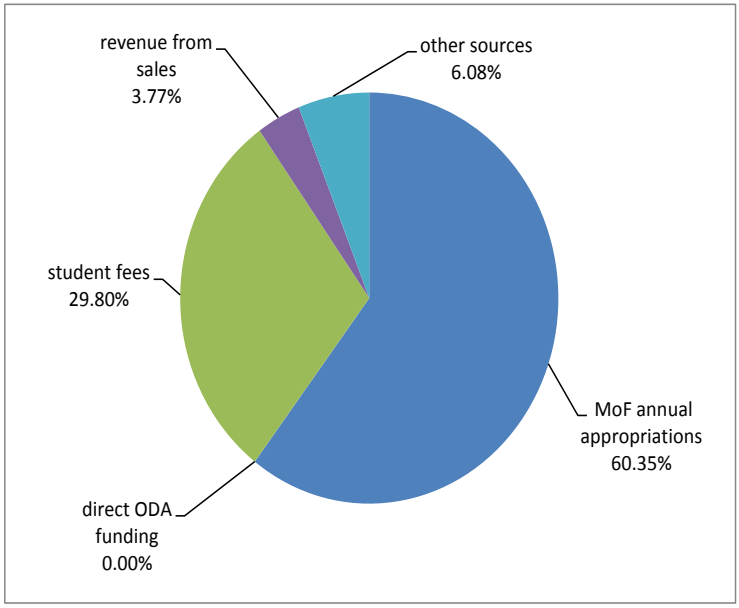
Testament to how uniform the funding situation post-2009 in NUS, and to how integrated funding for TVET and higher education operations have become, is given in Figure 14.8. It shows a remarkable degree of similarity between the extent to which both programs rely on government budget appropriations, student fees and revenue from the sale of services and other revenue sources. It also shows just how little development partners contribute directly to NUS funds. Figure 14.9 reveals how little the situation has changed since the merger was completed in 2009.

Figure 14.8 NUS revenue sources for the period 2010-11 to 2012-13

For all NUS purposes



Specifically for TVET operations

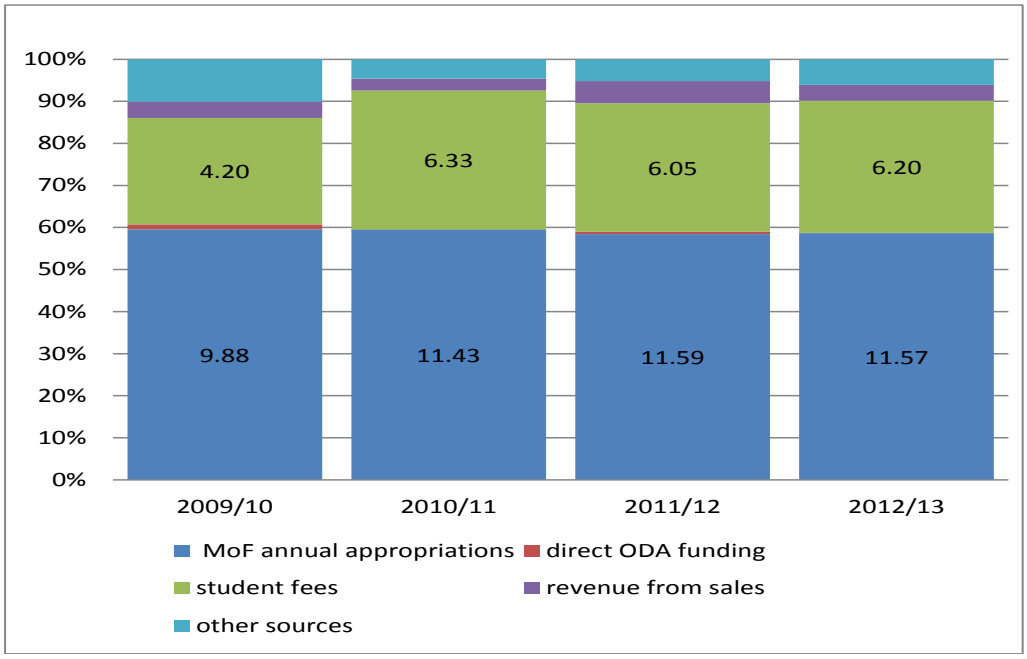


Source: Table 14.7.

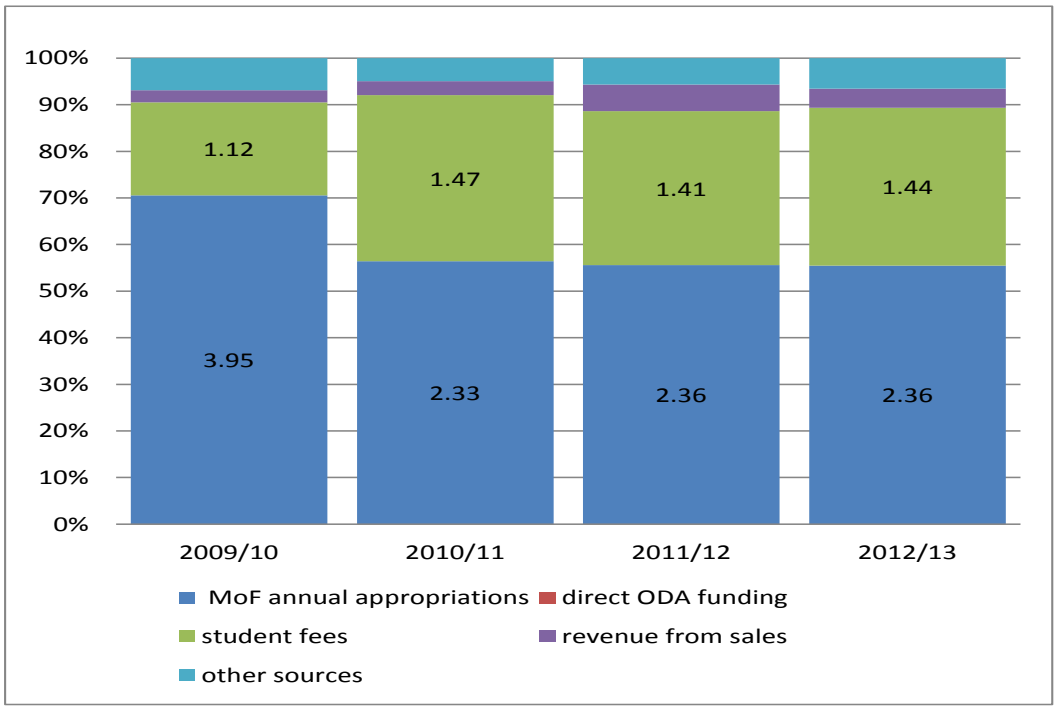
The extent to which NUS has been able to recover the costs of its operations in both TVET and higher education is clearly evident. Over the post-amalgamation period from 2009 onwards the university has funded around 40 per cent of its operations from fees and other non-government sources, and that this outcome is common to both TVET and higher education.

Figure 14.9 Composition of NUS revenue by source, 2009-10 to 2012-13

For all NUS purposes



Specifically for TVET operations



Source: Table 14.7 and additional material supplied by NUS.

NUS expenditures

Table 14.8 itemises the NUS expenditure program for 2011-12 and what is projected for 2012-13, drawing out of the standard expenditure categories of personnel, other operating expenses, development and capital expenditures, those items that are directly related to the provision of TVET programs.[43]

Table 14.8 NUS expenditure by category, 2011-12 and 2012-13 (WST millions)

	2011-12	2012-13	*2012-13*
	actual	projected	*projected (%)*
Routine recurrent/operational budget allocation			
Wages, salaries and other staff emoluments			
salaries and other emoluments of teaching/training staff directly involved in TVET programs	2.79	2.94	*16.0*
salaries and other emoluments of non-TVET program teaching staff	6.05	6.38	*34.7*
wages, salaries and other emoluments of non-teaching staff (including admin, general and management staff at the faculty and central admin level)	3.55	3.75	*20.4*
Total wages, salaries, etc	**12.40**	**13.07**	***71.0***
Other non-labour operating costs (consumables, utilities, maintenance, etc)			
directly associated with provision of TVET programs	1.34	1.14	*6.2*
incurred in non-TVET teaching programs and in non-teaching/training functions at the faculty and central admin level (eg in admin)	4.52	3.82	*20.8*
Total non-labour operating costs	**5.86**	**4.96**	***27.0***
Total routine recurrent budget	18.26	18.02	*97.9*
Development budget (including staff development)			
development/introduction of new TVET programs and/or upgrading of existing TVET courses	-	-	-
staff/professional development programs	0.10	0.10	*0.5*
other development items	-	-	-
Total development budget	**0.10**	**0.10**	***0.5***
Capital budget (expenditure on civil works, equipment, machinery, etc)			
directly related to TVET operations	0.26	0.06	*0.3*
other capital expenditure	0.89	0.22	*1.2*
Total capital budget	**1.15**	**0.28**	***1.5***
Total annual allocations for TVET operations	**4.39**	**4.15**	***22.6***
Total annual budget allocation – all categories	**19.50**	**18.40**	***100.0***

Source: Material provided by NUS.

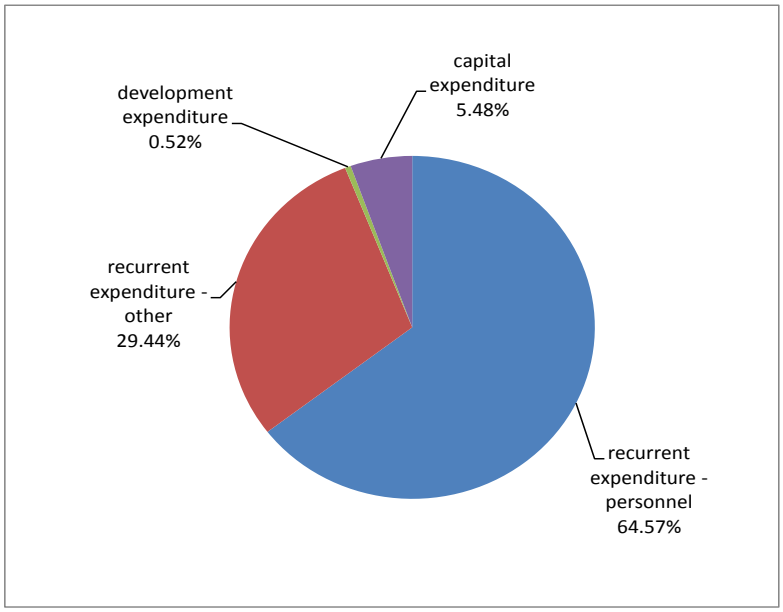
There is a marked similarity in expenditure patterns across the TVET and higher education programs of the university. Expenditure patterns in the delivery of TVET programs are almost

[43] NUS as a public body is able, within limits approved by MoF, to either build up surpluses of revenue over expenditure, or to go in to overdraft to cover deficits – see for example *NUS Annual Accounts 2010-2011*. It is also able, as noted in Chapter 13, some flexibility in moving funds between inputs within the same output and allocations between outputs.

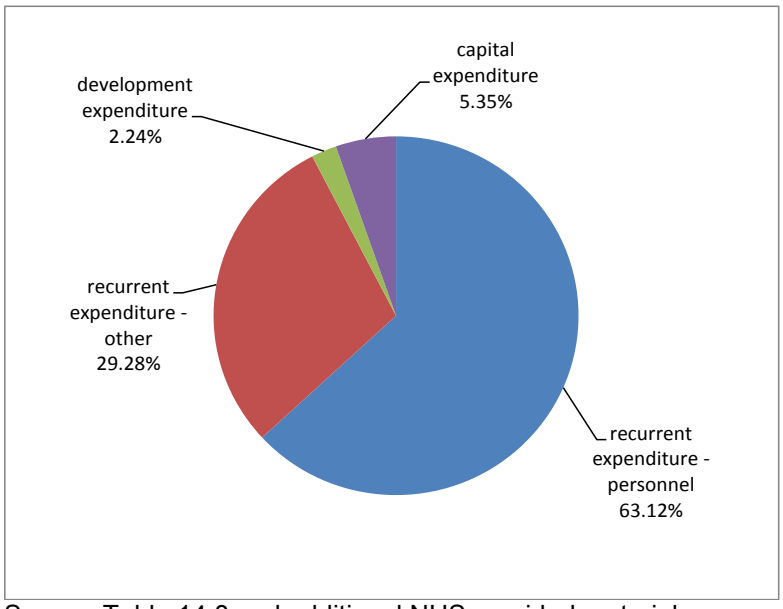
identical to those in the delivery of higher education. What is also apparent is that most of the NUS budget over the period was expended on its routine operations, with only about six to seven per cent being earmarked for development and capital purposes (see Figure 14.10).

Figure 14.10 NUS expenditure by category, for the period 2010-11 to 2012-13

For all NUS purposes



Specifically for TVET operations

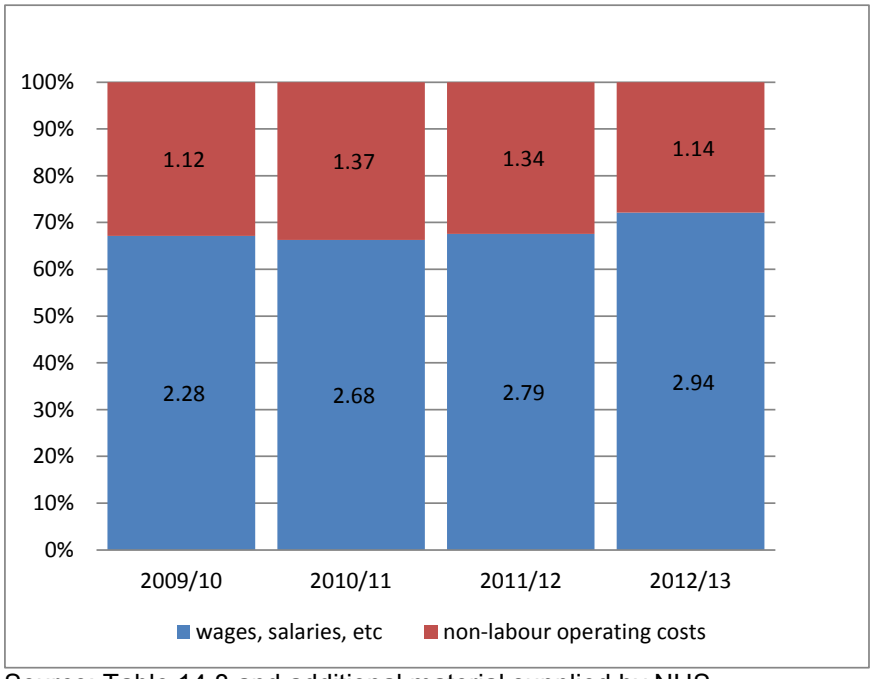


Source: Table 14.8 and additional NUS provided material.

Figure 14.11 Areas of NUS recurrent expenditure, 2009-10 to 2012-13 (WST millions)

For all NUS purposes

Specifically for TVET operations



Source: Table 14.8 and additional material supplied by NUS.

Figure 14.11 shows that meeting staff emoluments and other personnel expenses routinely accounted for about 70 per cent of annual recurrent expenditure over the period, but that this percentage was projected to increase in 2012-13, at the expense of other operating expenditure, to accommodate across the board staff salary increases (as total NUS expenditure is projected to decline in 2012-13).

14.3 PRIVATE PROVIDER REVENUE AND EXPENDITURE

The 2012 PSET Expenditure Review commissioned by SQA yielded only patchy data for the four private providers within our definition of TVET. The figures shown in Tables 14.9 to 14.12 are up-dated material provided by the institutions to this study. What the figures show is that DBTC was clearly the largest in terms of annual revenues, with LPTC and TIAS having approximately the same incomes. UVTC on Savai'i is the smallest. Their revenue and expenditure patterns, however, varied considerably, as is evident in Figure 14.12.

The salient features on the revenues collected by mission and private providers are as follows:

- All four institutions were in receipt of some assistance from government, via the MESC administered Mission School Grant Scheme.
- The three religious-based institutions were able to draw on support from their parent bodies. With the two providers operated by the Methodist Board of Education – LPTC and UTVC - over 70 per cent of their funding came from this source. DBTC, whilst it could draw on financial support from its parent, the Catholic Salesians of Don Bosco, had a much more diversified range of funding sources.
- For all three, however, student fees provided only around 10 to 12 per cent of their annual revenue.
- In stark contrast, the for-profit TVET provider TIAS could not rely on support from its owners, and, for them, fees were overridingly important, providing over 80 per cent of their annual income.

In terms of expenditure, differences are also apparent. Providers operated by religious bodies were able to devote a much greater percentage of their annual revenues to paying staff than was the for-profit provider. Not one of the former group seemed to direct any of their spending towards development programs. In contrast, TIAS funded all aspects of its operations, including staff development and capital works from its own resources. None of the four mission or private providers, however, allocated more than 15 per cent of their annual budgets to funding the operating costs of TVET provision.

Table 14.9 Revenue and expenditure for Don Bosco TC, 2008-09 to 2011-12 (WST)

	2008-09	2009-10	2010-11	2011-12	*2011-12 %*
Revenue					
Government grants	82,000	103,906	112,158	107,505	*18.5*
Donor grants	-	-	-	-	
Fees	106,800	155,000	139,745	59,410	*10.2*
Proceeds from sale of products/services	104,000	336,000	54,395	66,068	*11.3*
Church grants	190,000	190,000	147,317	129,638	*22.3*
Other incomes	87,000	164,594	96,285.69	219,624	*37.7*
Total Revenue	569,800	949,500	549,901	582,245	*100.0*
Expenditure					
Salaries, wages and other emoluments					
Teaching staff	269,400	267,900	298,186	221,990	*39.0*
Non-teaching staff	161,100	166,300	179,504	216,043	*37.9*
Total staff emoluments	430,500	434,200	477,690	438,033	*76.9*
Other operating expenditure	55,000	55,000	55,000	55,000	*9.7*
Total recurrent expenditure	485,500	489,200	532,690	493,033	*86.6*
Development expenditure	-	-	-	-	
Capital expenditure	76,400	76,400	76,400	76,400	*13.4*
Total Expenditure	561,900	565,600	609,090	569,433	*100.0*

Source: SQA *PSET Expenditure Review 2012*, Appendix 6, and material provided by Don Bosco.

Table 14.10 Revenue and expenditure for Laumua O Punaoa TC, 2008-09 to 2011-12 (WST)

	2008-09	2009-10	2010-11	2011-12	2011-12 %
Revenue					
Government grants	-	-	44,166	52,422	17.4
Donor grants	-	-	-	-	
Fees	-	-	38,180	32,720	10.9
Proceeds from sale of products/services	-	-	-	-	
Church grants	-	-	195,601	215,720	71.7
Other incomes	-	-	-	-	
Total Revenue	-	-	277,947	300,862	100.0
Expenditure					
Salaries, wages and other emoluments					
Teaching staff	-	-	148,705	157,993	54.4
Non-teaching staff	-	-	15,804	17,555	6.0
Total staff emoluments	-	-	164,509	175,548	60.4
Other operating expenditure	-	-	12,000	15,000	5.2
Total recurrent expenditure	-	-	176,509	190,548	65.6
Development expenditure	-	-	-	-	
Capital expenditure	-	-	90,000	100,000	34.4
Total Expenditure	-	-	266,509	290,548	100.0

Source: Material provided by Methodist Board of Education.

Table 14.11 Revenue and expenditure for Uesiliana TVC, 2008-09 to 2011-12 (WST)

	2008-09	2009-10	2010-11	2011-12	*2011-12 %*
Revenue					
Government grants	-	-	8,734	10,123	*12.1*
Donor grants	-	-	-	-	
Fees	-	-	12,980	10,360	*12.4*
Proceeds from sale of products/services	-	-	-	-	
Church grants	-	-	51345	63,224	*75.5*
Other incomes	-	-	-	-	
Total Revenue	-	-	73,059	83,707	*100.0*
Expenditure					
Salaries, wages and other emoluments					
Teaching staff	-	-	50,230	54,219	*66.5*
Non-teaching staff	-	-	12,265	15,374	*18.8*
Total staff emoluments	-	-	62,495	69,593	*85.3*
Other operating expenditure	-	-	10,000	12,000	*14.7*
Total recurrent expenditure	-	-	72,495	81,593	*100.0*
Development expenditure	-	-			
Capital expenditure	-	-			
Total Expenditure	-	-	72,495	81,593	*100.0*

Source: Material provided by Methodist Board of Education.

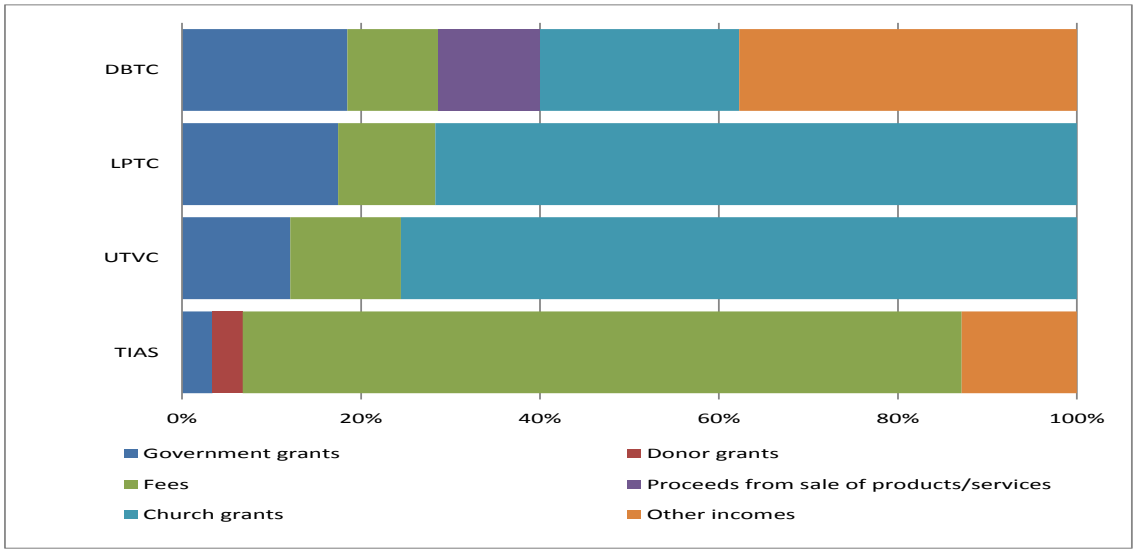
Table 14.12 Revenue and expenditure for TIAS, 2008-09 to 2011-12 (WST)

	2008-09	2009-10	2010-11	2011-12	*2011-12 %*
Revenue					
Government grants	-	20,000	25,000	10,000	*3.4*
Donor grants	-	6,000	8,000	10,000	*3.4*
Fees	-	219,934	242,687	237,000	*80.3*
Proceeds from sale of products/services	-	-	-	-	
Church grants	-	-	-	-	
Other incomes	-	10,000	30,000	38,000	*12.9*
Total Revenue	-	255,934	305,687	295,000	*100.0*
Expenditure					
Salaries, wages and other emoluments					
Teaching staff	-	63,010	48,087	53,605	19.0
Non-teaching staff	-	45,266	61,256	46,391	16.5
Total staff emoluments	-	108,276	109,343	99,996	35.5
Other operating expenditure	-	32,953	80,766	42,834	15.2
Total recurrent expenditure	-	141,229	190,109	142,830	50.7
Development expenditure	-	90,213	78,344	94,871	33.7
Capital expenditure	-	22,064	26,182	44,000	15.6
Total Expenditure	-	253,506	294,635	281,701	100.0

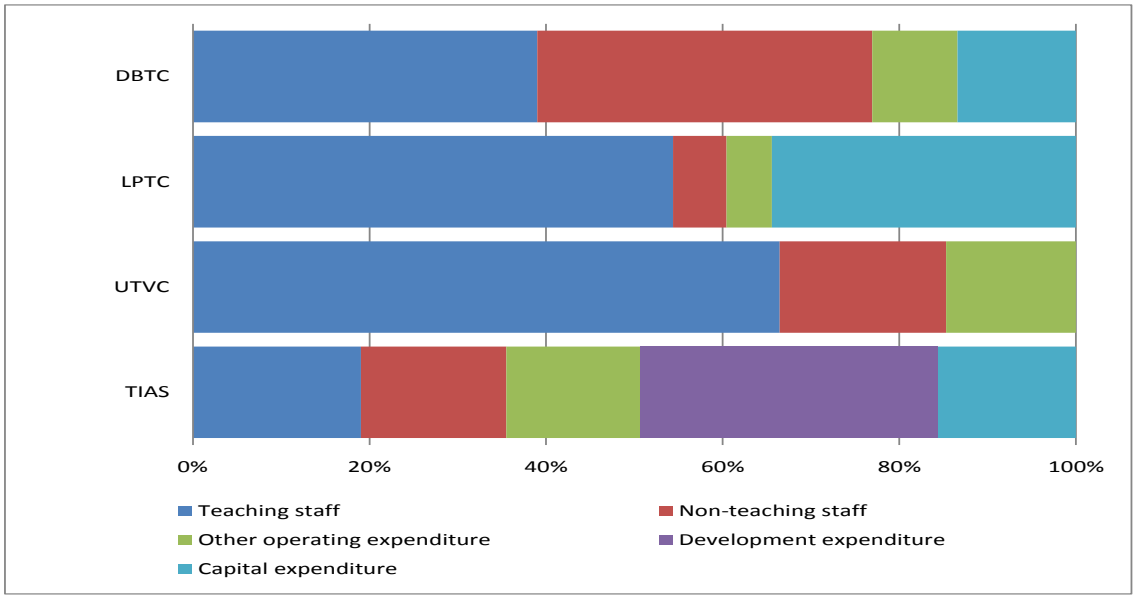
Source: Material provided by TIAS.

Figure 14.12 Revenue and expenditure patterns for private TVET providers, 2011-12

Revenue



Expenditure



Source: Tables 14.9 to 14.12.

14.4 TVET TEACHER REMUNERATION

Teachers in the TVET sector are paid strikingly different salaries and other emoluments, depending upon whether they are employed in NUS or in one or other of the private providers.[44] Staff employed by NUS are not employed under the Public Service Commission, but directly by the university under its own government approved salary and wage scales. Teachers in the private TVET vocational centres and colleges are not employed under any award system. Many are volunteers, or are members of religious orders.

With the completion of the amalgamation of SP/IoT into the university after 2009 TVET teaching staff were employed on the same salary scales and with the same employment conditions as other university staff. Table 14.13 shows that whilst this led to a substantial lift in average emoluments for TVET staff, they were still on average paid less than their higher education colleagues. In 2010 the average employment cost of TVET teachers was around the middle of the Lecturer Grade 1 scale, whilst that for other academic staff of the university was around the middle of the Senior Lecturer range. (The average employment cost of non-academic staff across the university was between Grades 2 and 3 of the Supporting Staff scale.)

Table 14.13 Salaries and other emoluments of NUS staff, 2009-10 to 2012-13

	2009	2010	2011	2012
Full-time equivalent (FTE) staff				
TVET teachers and trainers	56	53	52	52
Other NUS academic staff	87	92	97	97
NUS non-academic staff	116	117	115	121
Expenditure on salaries and other emoluments of NUS staff *(WST millions)*				
TVET teachers and trainers	2.28	2.68	2.79	2.94
Other NUS academic staff	4.94	5.81	6.05	6.38
NUS non-academic staff	2.90	3.41	3.55	3.75
Average expenditure on salaries and other emoluments per FTE NUS staff member *(WST)*				
TVET teachers and trainers	40,710	50,629	53,713	56,618
Other NUS academic staff	56,755	63,171	62,366	65,739
NUS non-academic staff	24,999	29,173	30,895	30,951

Source: Material provided by NUS.

Table 14.14 contrasts the average emoluments of teaching staff in the private TVET provider sector. The figures are for different years and, for one, gross staff numbers are applied not full-time equivalent (FTE) staff numbers. Even allowing for the incompatibilities in the data the comparison between the remuneration of TVET teachers in the private and public sectors is stark.

Comparisons in Table 14.15 are also revealing. The figures are not strictly comparable, since the NUS and TVET private provider figures are for total emoluments (salaries plus other entitlements) whilst the MCIL figures are annualised normal weekly earnings of employees. Nevertheless the figures are indicative of the marked differences in salary levels between the main public provider and other providers in TVET in Samoa.

[44] Teachers on APTC programs are on secondment from their TAFE colleges in Australia, and are employed under Australian terms and conditions.

Table 14.14 Salaries and other emoluments of teaching staff in private TVET providers, 2009-10 to 2011-12 (WST)

	2009-10	2010-11	2011-12
Don Bosco TC			
Teacher salaries and other emoluments	267,900	298,186	221,990
Number of teaching staff (gross)	26	29	26
Average emolument per staff member	**10,304**	**10,282**	**8,538**
Laumua O Punaoa Technical Centre			
Teacher salaries and other emoluments		148,705	157,993
Number of teaching staff (gross)		18	22
Average emolument per staff member		**8,261**	**7,182**
Uesiliana Technical and Vocational Centre			
Teacher salaries and other emoluments		50,230	54,219
Number of teaching staff (gross)		8	9
Average emolument per staff member		**6,279**	**6,024**
Tesese Institute of Administrative Studies			
Teacher salaries and other emoluments	63,010	48,087	53,605
Number of teaching staff (FTE)	6	5.5	6.5
Average emolument per staff member	**10,502**	**8,743**	**8,247**

Sources: SQA *PSET Expenditure Review 2012*, Appendix 6, and material provided by institutes.

Table 14.15 TVET teacher emoluments compared with average earnings in state-owned enterprises and private corporations, 2010

Employment area	WST
NUS academic staff	63,171
NUS TVET teachers and trainers	50,629
NUS non-academic staff	29,173
Finance	25,511
Electricity	22,552
Education	20,732
Community	19,963
Transport	18,803
Manufacturing	13,146
Agriculture	12,376
Government Administration	10,499
DBTC teachers and trainers	10,282
Wholesale	9,885
Building	9,214
TIAS teachers and trainers	8,743
LPTC teachers and trainers	8,261
Accommodation	7,405
UTVC teachers and trainers	6,274

Sources: Tables 14.13 and 14.14, and MCIL *Labour Market Survey*, 2010, Table 16.

14.5 FEES AND SCHOLARSHIPS

Fees

All TVET providers have schedules of fees, and they vary over a wide range, as is evident in Table 14.16. Fees vary by institution, by program and by year of course, with no consistent pattern. Not surprisingly the lowest fees tend to be those charged by the private providers, especially the two vocational centres run by the Methodist Education Board. The contribution apprentices are required to make to the program fees charges by NUS, which tend to be higher than comparable non-apprenticeship programs, are also amongst the lowest. The highest fees are those charged by NUS in its School of Engineering programs, and nominally, by the APTC School of Trades and Technology.

Institutions determine their course fee levels using a variety of criteria from revenue raising and cost recovery to making their courses competitive and attractive to students. To some extent it depends on the degree to which the institution relies upon course fees to cover expenses and allow it to continue its operations.

Table 14.16 TVET provider fee levels, 2011-12 (WST)

Institution/area			annual fee range	
			low	high
NUS				
SoE			1,580	3,350
SMT			1,585	1,585
SBGS			1,160	1,390
NUS Apprenticeship Scheme	low	high	(apprentice share*)	
Motor Mechanic	2,250	2,775	450	555
Welding	1,700	3,450	340	690
Electrical	1,700	2,900	340	580
Plumbing	1,960	2,440	392	488
Carpentry	2,160	2,440	432	488
Refrigeration	1,700	1,950	340	390
Fitting	1,950	1,980	390	396
Private providers				
DBTC			650	650
LPTC			750	750
UVTC			800	800
APTC				
STT			2,300	2,300
SHC			800	1,900

* Apprenticeship fee charged by NUS are split between the apprentice 20%, employer 30% and government 50%. Fee levels vary by year over the four-year apprenticeship.
Source: Material supplied by institutions.

Overall, however, fees must be affordable for them to be a useful source of revenue, on the one hand, whilst not being a disincentive to enrol on the other. Table 14.17 sets TVET program fees charged in 2011 against household income. The latest information on the latter comes from the Household Income and Expenditure Survey the SBS conducted in 2008. Whilst the two sets of figures are not strictly comparable (household incomes may have

changed in the three years between 2008 and 2011) some idea of the affordability of TVET fees can be gained if the comparison is treated with caution.

In Table 14.17 the comparison is made between the number of weeks of average household income it would take to pay the full course fees charged by TVET providers for households in each of the ten household income deciles. What it shows is just how high fees in many of the TVET programs are relative to the weekly incomes of many Samoan households. Even the lowest fee courses would still require the lowest income households expending several weeks' income to enable just one of its members to enrol in a TVET course.

Table 14.17 Number of weeks of household income (2008) needed to pay highest level TVET fees (2011-12)

Institution/area	Av. house-hold weekly income	Household weekly income deciles									
		1	2	3	4	5	6	7	8	9	10
NUS											
SoE	4.8	25.8	14.9	11.3	9.2	7.6	6.2	5.2	4.1	3.0	1.4
SMT	2.3	12.2	7.0	5.3	4.3	3.6	2.9	2.4	1.9	1.4	0.7
SBGS	2.0	10.7	6.2	4.7	3.8	3.1	2.6	2.1	1.7	1.2	0.6
NUS Apprenticeship Scheme											
Motor Mechanic	0.8	4.3	2.5	1.9	1.5	1.3	1.0	0.9	0.7	0.5	0.2
Welding	1.0	5.3	3.1	2.3	1.9	1.6	1.3	1.1	0.8	0.6	0.3
Electrical	0.8	4.5	2.6	2.0	1.6	1.3	1.1	0.9	0.7	0.5	0.2
Plumbing	0.7	3.8	2.2	1.6	1.3	1.1	0.9	0.8	0.6	0.4	0.2
Carpentry	0.7	3.8	2.2	1.6	1.3	1.1	0.9	0.8	0.6	0.4	0.2
Refrigeration	0.6	3.0	1.7	1.3	1.1	0.9	0.7	0.6	0.5	0.3	0.2
Fitting	0.6	3.0	1.8	1.3	1.1	0.9	0.7	0.6	0.5	0.4	0.2
Private providers											
DBTC	0.9	5.0	2.9	2.2	1.8	1.5	1.2	1.0	0.8	0.6	0.3
LPTC	1.1	5.8	3.3	2.5	2.0	1.7	1.4	1.2	0.9	0.7	0.3
UVTC	1.2	6.2	3.6	2.7	2.2	1.8	1.5	1.2	1.0	0.7	0.3
APTC											
STT	3.3	17.7	10.2	7.7	6.3	5.2	4.2	3.5	2.8	2.1	1.0
SHC	2.7	14.6	8.4	6.4	5.2	4.3	3.5	2.9	2.3	1.7	0.8

Sources: Table 14.16; and SBS *Household Income and Expenditure Survey*, Tabulation Report, 2008, Table 2.4, page 51.

It is clear from Table 14.17 that without the assistance of a 'scholarship' scheme, enrolment in NUS and APTC programs would be beyond the means of a large percentage of Samoan households.

Fee levels of course can not only be viewed from the perspective of their affordability, and hence their likely impact upon the demand for TVET programs by Samoan households. Student fees can also be seen as a means of recovering the costs of course delivery. In Chapter 16 of this study a variety of measures of unit costs of TVET delivery are identified and estimates made for them for programs offered in NUS and APTC and by private providers.

Tables 14.18 to 14.20 set student fees against one of those unit cost measures – estimated course cost per student, to gauge the extent to which student fees are able to recover costs.

Table 14.18 Student fees and estimated costs per student, NUS 2011-12 (WST)

School and course	Est. per student cost[1]	Course fees		Est. % cost recovery
		Annual	Total	
School of Engineering				
Certificate in Panel Beating and Spray Painting	9,201	1,505	1,505	16.4%
Certificate in Tropical Horticulture	4,442	1,505	1,505	33.9%
Diploma in Radio & Electronics	6,780	1,505	3,195	22.2%
Intermediate Certificate in Automotive Engineering	4,771	1,505	2,380	31.5%
Intermediate Certificate in Construction & Joinery	3,303	595	1,190	18.0%
Intermediate Certificate in Electrical Engineering	2,221	595	1,190	26.8%
Intermediate Certificate in Fitting & Machining	3,789	595	1,190	15.7%
Intermediate Certificate in Plumbing & Sheetmetal	10,734	1,190	2,380	11.1%
Intermediate Certificate in Refrig & Air Conditioning	3,789	1,190	2,380	31.4%
Intermediate Certificate in Welding & Metal Fab	5,601	1,190	2,380	21.2%
School of Maritime Training				
Certificate of Achievement in Maritime Training R.2	4,259	1,505	1,505	35.3%
Certificate of Achievement in Maritime Training R 1	46,499	1,505	1,505	3.2%
School of Business and General Studies				
Certificate of Tourism and Hospitality	5,009	1,505	1,505	30.0%
Diploma in Business	2,103	1,598	3,195	76.0%
Diploma in Journalism	4,074	1,598	3,195	39.2%
Diploma in Office Management	959			
Diploma in Tourism	2,328	1,598	3,195	68.6%

1. The assumptions made and the steps taken to estimate unit costs are outlined in Annex 6.
Sources: Table 16.1 and material supplied by NUS.

Table 14.19 Student fees and estimated costs per student, private providers, 2011-12 (WST)

Course	Est. cost per student[1]	Course fee	est. % cost recovery
DBTC			
Basic Trades Skills	2,825	700	24.8%
Carpentry & Joinery	4,869	700	14.4%
Motor Mechanics	2,137	700	32.8%
Plumbing & Sheetmetal	2,763	700	25.3%
Welding & Metal Fabrication	3,038	700	23.0%
LPTC			
Sewing & Cooking,	1,773	750	42.3%
Fine Art,	1,697	750	44.2%
Automotive,	1,923	750	39.0%
Welding,	3,322	750	22.6%
Electrical	953	750	78.7%
Carpentry	7,418	750	10.1%
Computer	1,029	750	72.9%
Music	1,296	750	57.9%
UTVC			
Sewing & Cooking	1,443	800	55.5%
Fine Art,	1,940	800	41.2%
Automotive,	1,360	800	58.8%
Welding,	1,287	800	62.1%
Electrical	821	800	97.4%
Carpentry	1,782	800	44.9%
TIAS			
Office Admin. & Computing	709	980	138.3%
Office Admin. & Computing	724	1,110	153.2%
Certificate in Computing	779	770	98.8%
Certificate in Computing	1,621	890	54.9%
Office Admin. & Computing	1,813	1,240	68.4%

1. The assumptions made and the steps taken to estimate unit costs are outlined in Annex 6.
Sources: Tables 16.2 to 16.5 and material supplied by institutions.

What these tables show is that there are wide variations in the capacity of student fees, if collected, to cover costs of delivery. Very few fees, however, come close, especially amongst courses offered by NUS and APTC.. Even amongst private providers it is only the for-profit TIAS that has set fees that could realistically cover delivery costs.

The actual amount collected from student fees depends upon how widely they are applied by institutions amongst those enrolling in their courses. Scholarship, fee waiver and other student assistance schemes all have the effect of reducing the cost-recovering and revenue raising capacity of fee income.

Table 14.20 Student fees and estimated costs per student, APTC 2011-12 (WST)

School and course	Est. per student cost[1]		Fees	Est. % cost recovery	
	Direct	Total		Direct	Total
School of trades and technology					
Mechanical trade (fitting and machining)	39,119	99,618	2,300	5.9%	2.3%
Fabrication trade (boiler-making)	11,694	29,780	2,300	19.7%	7.7%
Plumbing	11,416	45,498	2,300	20.1%	5.1%
Refrigeration and air-conditioning	19,283	76,848	2,300	11.9%	3.0%
School of hospitality and community services					
Tourism operations	11,852	31,581	900	7.6%	2.8%
Hospitality operations	9,945	26,501	800	8.0%	3.0%
Hospitality – commercial cookery	14,703	39,178	1,900	12.9%	4.8%

1. The assumptions made and the steps taken to estimate unit costs are outlined in Annex 6.
Sources: Tables 16.6 and 16.7 and material supplied by APTC.

Table 14.21 shows that distinctly different patterns have emerged across the sector. At one end of the spectrum there is APTC, that implements a comprehensive scholarship program and in 2011-12 generated no income from fees, and at the other TIAS that derives over 80 per cent of its income from this source. In between is NUS that operates a selective scholarship program but still manages to source about a third of its income from fees, and the private providers operated by religious bodies that generate only around 10 to 12 per cent of their income from student fees. Fee-waiver and informal assistance arrangements for needy families are routinely applied by these institutions.

Table 14.21 Student fees as a source of income for TVET providers, 2011-12 (%)

TVET provider	%
NUS TVET programs	33.2%
DBTC	10.0%
LPTC	10.9%
UTVC	12.4%
TIAS	80.3%
APTC	0.0%

Source: Material supplied by institutions.

Student assistance schemes

As alluded to above, there are two scholarship schemes in operation in the TVET sector in Samoa, one in NUS and the other in APTC. Both are administered by the institutions themselves, and are open only to their own students.

NUS scholarships are awarded on a semester basis. Awards can be partial or full tuition fee covering. Both types, however, also cover registration fees (WST 150) and a book allowance (WST 200). In 2010, 131 scholarships were awarded, 66 partial fee and 65 full-fee. Expenditure in that year totalled WST 200,058 (141,208 covering tuition fees, 19,650 registration fees and 39,200 book allowance).

As a regional institution APTC has to cater for and be accessible to students from across the region, as well as those from Samoa. (As noted in Chapter 8, the majority of the students

enrolled in the APTC Samoa campus programs are from other countries – 150 out of a total of 240 in 2011-12). The APTC scholarship allows for this.
Full awards cover APTC fees and also provide financial support to cover international travel and living costs and medical insurance. This level of scholarship assistance is open to non-Samoan students studying at APTC Samoa. However, Samoan students enrolled in other APTC campus countries in courses not offered by APTC Samoa are also be eligible for a full award. (In 2011-12 there were 25 Samoan students enrolled in APTC Fiji campus courses – see Chapter 8.)

Partial awards that cover APTC fees as well as some financial support for costs directly related to studying, are open to Samoan students enrolled in APTC Samoa.

In 2011-12 expenditure on scholarships (both full and partial awards) by APTC Samoa was just over WST 2 million.

In neither of the NUS nor APTC schemes are the awards determined primarily on the basis of merit, nor are competitive on the basis of scholastic achievement. Having met the entry requirements for the course students are then judged eligible for financial assistance on a range of other criteria, only one of which is academic merit and/or technical competence. The following are the criteria applied by APTC[45] in determining who is eligible for its awards, and they are no doubt similar to those applied by NUS.

Consideration is given to:

- the economic capacity of the applicant to pay for his or her own education
- the allocation of awardees between countries
- the equitable allocation of awardees between schools
- gender equity
- academic merit and technical competency
- an appropriate balance between existing workers, and unemployed graduates
- whether the applicant is from a rural/disadvantaged background
- whether the awardee has previously received scholarship support
- the impact on labour supply in the small islands states, if too many awardees are selected from one employer/location at the same time.

14.6 DEVELOPMENT PARTNER ASSISTANCE TO TVET

At the time of writing there were three development partner assistance programs impacting upon the TVET sector in Samoa. All three were funded by the Australian Government. The levels of funding are given in Table 14.22.

Table 14.22 Australian Government assistance provided to TVET sector, 2011-12

Program	WST
TVET Support Program	1,367,589
APTC Samoa operations	11,756,869
Samoa In-Country Training Program	896,000
Total	**14,020,458**

Sources: AusAID, SQA and APTC.

[45] See APTC website

TVET Support Program

2011-12 was the first year of a three-year program, administered by SQA. Table 14.23 provides a breakdown of expenditure estimates by outputs (Key Result Areas).

Table 14.23 Support for TVET: Road Map Year 1 budget, 2011-12

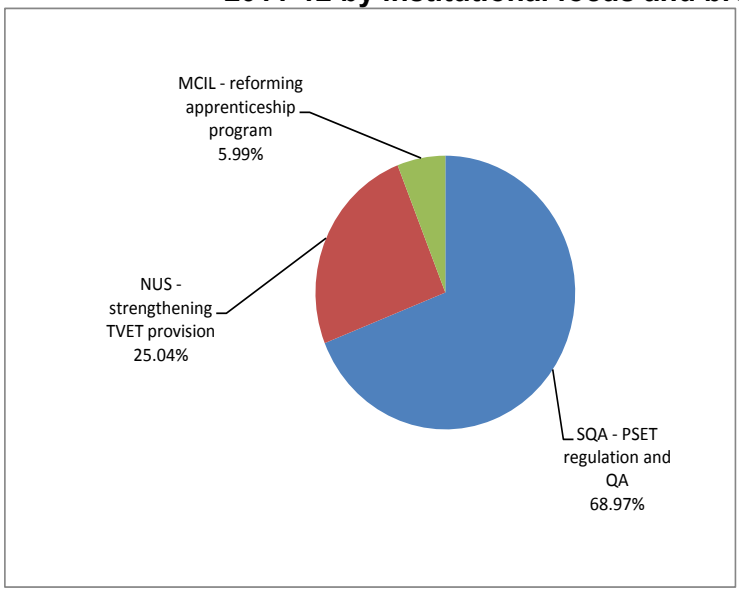
	Activity	WST
Prog. Man.	assist the SQA by providing program management services to implement and manage the progress of the TVET program	106,620
KRA 1	develop and apply industry-endorsed competency standards in apprenticeships and other trades training program	386,070
	undertake comprehensive review and reform of apprenticeship scheme	81,940
KRA 2	achieve international recognition/equivalence/comparability of selected Samoan qualifications	54,120
	quality assure and strengthen TVET providers/accreditation of TVET programs	60,720
	design and deliver personalised professional development program for all NUS-IOT lecturers	182,000
	budget support to NUS-IOT for consumables	160,459
	improved information about provider performance available to the market place	66,120
KRA 3	develop and strengthen SQA's non-formal learning policies, procedures, and to establish a small grants program to assist non-formal learning providers	188,720
KRA 4	introduce a new funding approach, that enables growth and development and ensures accountability	80,820
	Total	**1,367,589**

KRA = key result area
Source: AusAID.

The following points can be noted from Table 14.23.

- The table contains proposed KRA and cost estimates only.
- It was proposed to spend most of the funds in support of SQA PSET-wide activities. The exceptions were the review and reform of the apprenticeship scheme managed by MCIL (under KRA 1); the design and deliver of a personalised professional development program for all NUS-IOT lecturers, through the Oloamanu Centre at NUS (under KRA 2) and budget support to NUS-IOT for consumables (under KRA 2).
- The PSET Expenditure Survey commissioned by SQA in 2012 was funded under KRA 4.

Figure 14.13 Australian Government support for TVET – composition of budget in 2011-12 by institutional focus and broad area of program activity (%)



Source: Table 14.23.

APTC operations in Samoa

APTC's Samoan campus is one of five the college operates across the region. It is funded almost entirely by the Australian Government[46] (as already noted the college derives no income from program fees in Samoa).[47] Being part of a regional organisation run by an Australian-based consortium with its operational headquarters in Nadi, Fiji, means of necessity that its campus and school operations carry significant overheads. Table 14.24 shows that whilst the recurrent costs of delivery TVET programs on the Samoan campus was around WST 5.7 million in 2011-12, the total cost of APTC operations in the country, factoring in the local scholarship and capital development programs, and the college's management overheads at the campus and regional levels, brought the cost up to approximately WST 12.6 million for the year. Figures 14.14 and 14.15 show the proportion of this combined operational and pro-rata annual allocation by function and input category.

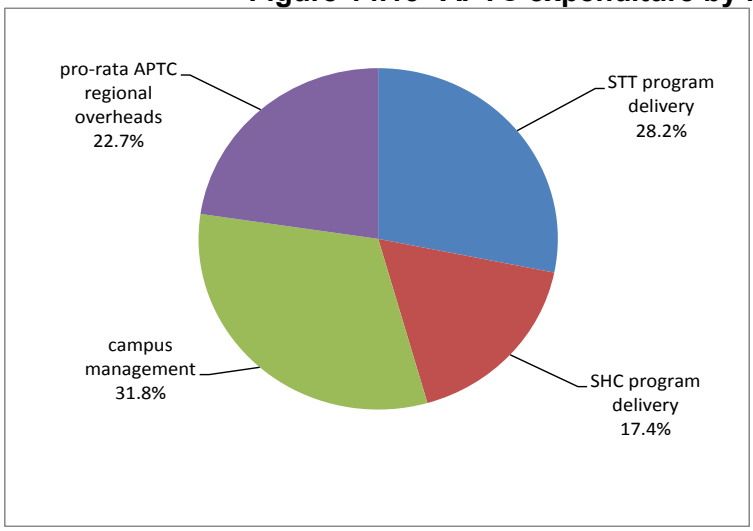
Table 14.24 Expenditure on APTC operations in Samoa, 2011-12 (WST thousands)

Item	STT	SHC	Campus management	Total Samoan campus	Pro-rata regional overheads	Total APTC Samoa
Personnel	1.564	1.227	0.831	3.623	1.791	**5.413**
Operating expenditure	1.984	0.966	0.795	3.744	0.631	**4.375**
Total recurrent	**3.548**	**2.194**	**1.625**	**7.367**	**2.421**	**9.788**
Scholarship program	-	-	2.237	2.237	-	**2.237**
Capital expenditure	-	-	0.137	0.137	0.434	**0.571**
Total operations	**3.548**	**2.194**	**4.000**	**9.742**	**2.855**	**12.597**

STT = School of Trades and Technology
SHC = School of Hospitality and Community Services
Source: Material provided by APTC.

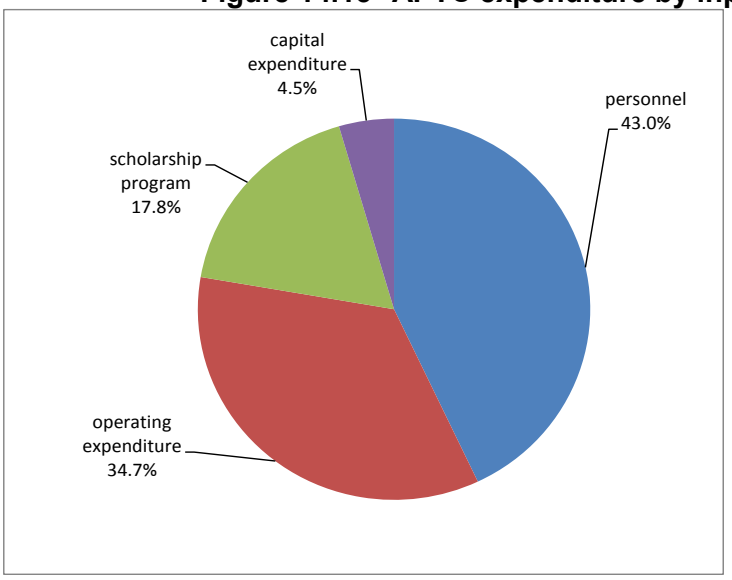
[46] Australia allocated A$152 million to APTC over 2011 to 2015.
[47] APTC earned WST 9,100 from its restaurant operations in 2011-12.

Figure 14.15 APTC expenditure by function, 2011-12



Source: Table 14.24.

Figure 14.15 APTC expenditure by input category, 2011-12



Source: Table 14.24.

Samoa In-Country Training Program

The financial mechanisms governing this program are outlined in Chapter 13.

14.7 QUALITY ASSURANCE AND REGULATORY DEVELOPMENT

Neither SQA nor MCIL's Apprenticeship and Employment Services division provide TVET programs, but both can be considered part of the TVET sector because of the important management, regulatory and quality assurance roles they play. Moreover they also act as conduits for the funding of TVET provision, as is clear in the following tables.

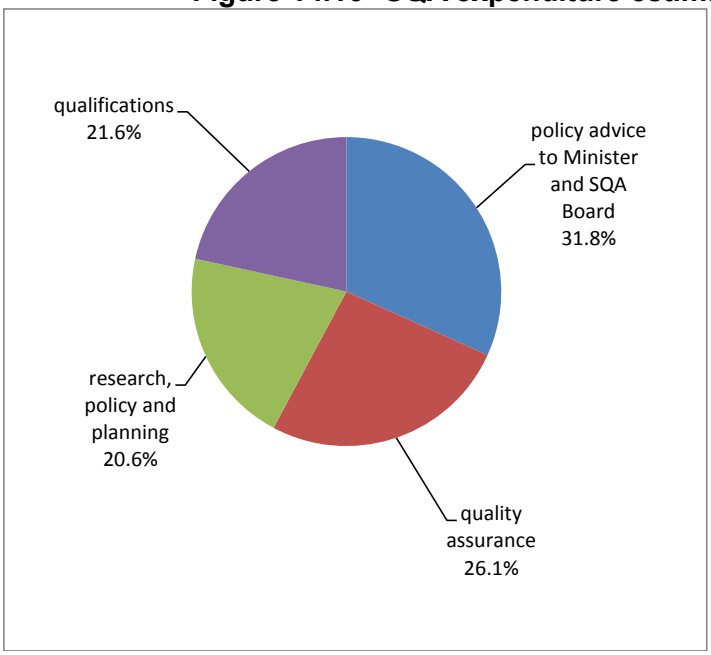
Table 14.25 Output and input budget estimates for SQA, 2012-13 (WST)

	Output area	Personnel	Operating expenses	Total recurrent	Over-heads	Total
1	Policy advice to Minister and SQA Board	306,782	73,800	380,582	182,670	563,252
2	Quality assurance	232,942	137,823	370,765	91,335	462,100
3	Research, policy and planning	255,814	18,418	274,232	91,335	365,567
4	Qualifications	251,121	40,450	291,571	91,335	382,906
Total MoF appropriation		**1,046,659**	**270,491**	**1,317,150**	**456,675**	**1,773,825**
Australian Government TVET support grant						952,000
Total budget						**2,725,825**

Source: GoS *Parliamentary Paper No.2*, 2012-13.

Table 14.25 sets out MoF's estimated expenditure allocations for SQA in 2012-13 by output and input categories, and Figures 14.16 and 14.17 depict them in relative terms.[48]

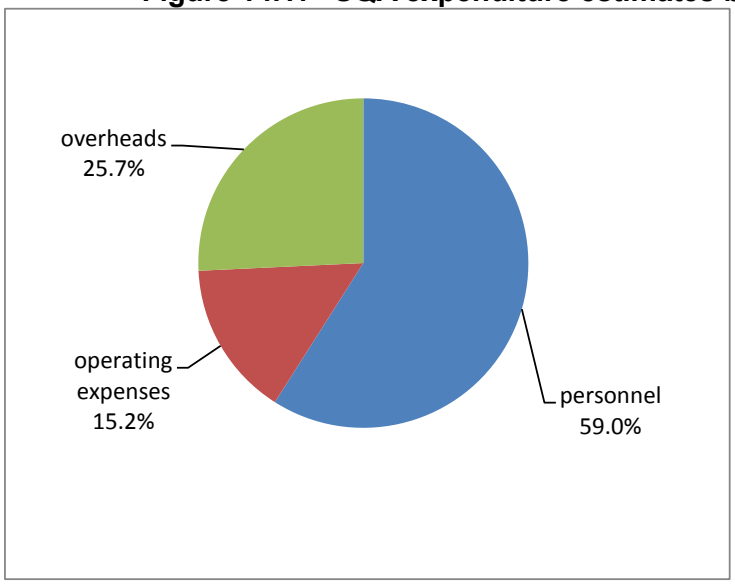
Figure 14.16 SQA expenditure estimates by output, 2012-13



Source: Table 14.25.

[48] Note the difference between the estimate for the AusAID funded TVET Support Program included in MoF's budget estimates for SQA in Table 14.25 and the estimate provided by SQA and AusAID for the program in Table 14.22

Figure 14.17 SQA expenditure estimates by input category, 2012-13



Source: Table 14.25.

Table 14.26 details the financial support to the TVET sector's operations from MCIL. It comes in two parts – the administration of the country's apprenticeship scheme and employment services and the subsidy to NUS as the provider of training programs for apprentices. In total, this accounts for around 15 per cent of the ministry's budget allocation.

Table 14.26 Budget estimates for MCIL's administration of the apprenticeship scheme and employment services, 2012-13 (WST)

	Output area	Personnel	Operating expenses	Total recurrent	Over-heads	Total
5	Administration of apprenticeship scheme and employment services	351,088	58,710	409,798	99,118	508,916
	Cost recovery					3,504
Total MoF appropriation						**505,412**
	Grant to apprenticeship training provider (NUS)					123,800
Total MCIL support for TVET						**629,212**
Per cent of MCIL outputs						14.7%

Source: GoS *Parliamentary Paper No.2*, 2012-13.

CHAPTER 15. SURVEYING EMPLOYER PROVIDED AND FUNDED TRAINING

15.1 OBJECTIVES OF THE PILOT SURVEY

The aim of this study into the financing of TVET in the Pacific is, as far as is feasible, to map all sources of funding and all types expenditure that fall within its scope. Integral to this is the examination of training undertaken by employers themselves for their workers.

MCIL conducts a labour market survey every three years, the latest being in 2010[49] with the next one planned for 2013. The survey includes state-owned enterprises (such as EPC and the Samoa Water Authority) as well as privately-owned corporations. It includes a section on skill shortages and training needs; however, the survey does not elicit information about the extent of the training enterprises themselves conduct to ease these shortages and to meet their skill requirements.

The purpose of this aspect of the study is to propose a way of filling this information gap, by devising and conducting a small pilot study of enterprises that specifically focuses on obtaining information about their own training programs for new recruits and existing employees, and about who conducts them and how they are funded.

The study team made it clear to both MCIL and the SBS that this was the intention, and it sought both the approval and advice of both agencies as to the best way to proceed.

15.2 METHODOLOGY

Survey instrument

The questionnaire that was used is contained in Annex 4. In a number of important aspects it is similar to, and overlaps, the instrument used in the triennial labour market survey.

It seeks information relating to three broad areas of the enterprises' operations:

- general background – type of enterprise; industry; exposure to international markets; annual turnover; annual wages bill; size of workforce;
- workforce characteristics – gender; full-time/part-time; occupations; highest level of educational attainment; recruitment of TVET workers; and
- training – number and trades of apprentices; amount and type of training given to new recruits and annually to existing workers; annual expenditure on training provision and trainee support.

Wherever appropriate, standard international classification systems were used in the survey instrument design.[50]

[49] Ministry of Commerce, Industry and Labour, Labour Market Survey of Private Sector Employers in Samoa, 2011

[50] See Annex 7

Survey participant selection

Given the constraints of time and resources the survey team faced, and the decision to not burden either SBS or MCIL with additional unscheduled activities, the pilot survey was conducted on a very small scale. The intention was to survey no more than fifteen enterprises. In the event the team was able to survey thirteen.

With such a small number to be surveyed it would have been difficult to achieve statistically significant results, even if drawing a random sample from a suitably stratified population of enterprises could have been undertaken. The team opted instead to hand-pick participants from two, albeit overlapping, lists of enterprises available to them – the list of enterprises participating in the Apprenticeship Scheme, and the list of members of the Chamber of Commerce.

The strategy was to select a balance of enterprises – between state-owned and private corporations, between participants and non-participants in the apprenticeship scheme and a mix of industries. Preference was given to large and medium-sized enterprises, to cover a more than proportionate number of employees. The intention was to draw upon the strong local knowledge of the employment scene in Samoa available to the team to maximize the insight into training patterns amongst employers.

The team, of course, was well aware that in using these selection criteria it could not draw any inferences from the survey about the whole population of enterprises in Samoa. Only qualified statements about findings can be made.

Survey administration and data collection and storage

Once selection had been made an initial approach was made by a team member to the enterprise, usually through the chief executive officer (CEO), outlining the nature of the exercise and seeking an appointment. If, as was the case with every enterprise selected, this first meeting led to an agreement to participate, then a copy of the survey instrument was left with the enterprise and a point of contact (the CEO or a designated subordinate) established. Further meetings were arranged, first to assist in the compilation of the information and in the correct filling in of the questionnaire, and then to collect the completed questionnaire. In a number of cases a further meeting was arranged if it was found that there were any major gaps or inconsistencies in the completed forms.

At each point of contact confidentiality was stressed. It was emphasised that the completed questionnaires, and the data base into which their contents were to be fed, would be kept secure, and in the subsequent analyses it would not be possible to identify individual participant data.

15.3 SURVEY FINDINGS

Table 15.1 summarises some of the key characteristics of the survey participants. It can be noted that on average the SOE surveyed tended to be larger and employed comparatively more males and workers with TVET level qualifications than did the private sector enterprises surveyed.

Table 15.1 Summary statistics for the enterprises surveyed (2011-12)

Indicator	SOE	Private enterprises	All
Number of enterprises	5	8	13
Average annual revenue (WST millions)	38,004	26,234	30,761
Average wages bill (WST millions)	5,294	2,784	3,749
Average number of employees	218	149	176
Per cent employees full-time	95%	91%	93%
Per cent employees female	17%	40%	29%
Per cent employees with TVET certificate levels 1-5	34%	11%	23%

SOE = State-owned Enterprise

A summary of the amount of training undertaken by the participating enterprises is given in Table 15.2. It shows that all indicated that they either provided funded or otherwise supported training both initially for new recruits and then on an ongoing basis for their workers. Less than half the respondents in both the public and private sectors indicated they participated in the apprenticeship scheme, but amongst those that did SOEs employed twice as many on average as did private corporations.

As to the number of hours training provided annually for new recruits and ongoing workers that responses varied widely, with some hardly providing any such training, whilst others indicated that large amounts of training were provided. (Surprisingly high levels in some cases)

Table 15.2 Summary statistics on training in the enterprises surveyed (2011-12)

Indicator	SOE	Private enterprises	All
Number of respondents indicating they provide recruits with initial training	5 (100%)	8 (100%)	13 (100%)
Number of respondents indicating they provide ongoing training for employees	5 (100%)	8 (100%)	13 (100%)
Number of respondents with apprentices	2 (40%)	3 (38%)	5 (38%)
Average number of apprentices in each enterprise	25	11	16
Average hours training for recruits in first year	166	201	187
Average hours training annually for existing workers	426	250	317

SOE = State-owned Enterprise

Similar variability was also observed in the responses to the questions relating to expenditure on training. Table 15.3 provides a summary of the responses received.

Table 15.3 Estimated expenditure on training in enterprises surveyed (2011-12)

Indicator	SOE	Private enterprises	Total
Training expenditure as per cent of total revenue	0.33%	0.26%	0.29%
Training expenditure as per cent of wages bill	2.34%	2.44%	2.38%
Average training expenditure per full-time employee (WST)	597	500	547
Average training expenditure per employee (WST)	567	455	509

SOE = State-owned Enterprise

Even allowing for the marked differences in some of the responses, the averages are in the range of what could have been expected. Annual expenditure of around WST 450-600 per worker is not an unremarkable finding, nor is expenditure on training at around 2.4 per cent of the annual wages bill.

15.4 LESSONS LEARNED

It is clear that questions relating to the amount and type of training undertaken by enterprises and to their expenditure on training would be very important additions to the labour market survey. The timely and reliable information they would yield would be an extremely important tool at the disposal of TVET planners.

Even a survey as small as this points to the incidence of training being widespread amongst employers in both the SOE and private corporate sectors, and the amount employers are willing to expend on it is not insignificant. It was able to show that, in both respects, perhaps there are differences between the two sectors. However, the sample was much too small to explore whether there are any systematic differences between industries, by enterprise size or by the extent of exposure to global competition. A much larger sample would be needed for that, or a complete census of enterprises such as the one employed by MCIL in the labour market survey.

As a pilot survey this exercise was able to identify a number of issues that would have to be addressed in a larger, more systematic survey of this kind. The team found that for many of the respondents their human resources (HR) and financial record-keeping were not well configured to answer the questions relating to their training activities. CEOs and managers commented that they had difficulty compiling the information we had requested (a) because they had not needed to do so for their own administrative purposes, or (b) had not been obliged to in order to meet information requests from government agencies such as SBS or MCIL, or by industry bodies such as the Chamber of Commerce.

Areas of HR record-keeping in which difficulties arise, include:

- Classifying occupations in the enterprises using the ISCO-08 system. Enterprises do not normally have access to the full ISCO-08 four-digit classification system, which identifies specific occupations and job descriptions, and so in some instances are left to guess which broader occupational category workers are employed in.
- A worker's highest level of educational attainment was sometimes not recorded, as it was not considered relevant to the job he or she was hired to do. Even if asked for in the initial job application it may not have gone on to the HR personnel file.

- Hours of training undertaken upon orientation to the enterprise and on-going during employment are often not recorded in any systematic way, and frequently regarded as endogenous to the job. Not all enterprises have a separate 'training department' and/or designated training manager, and training is often the responsibility of section heads.

Similar difficulties can arise on the financial side – training is often not a separate cost centre, but an expense built in to other operations, either on the production side, or as part of the HR function, occupational health and safety, etc. Identifying the training component could therefore be difficult.

What this has meant for the survey is that not all respondents were able to provide figures for training hours and training expenditure in the detail asked in the questionnaire. Or if they did they were only 'best estimates'. Even the total figures given were probably only rough estimates in a number of instances.

If questions regarding the amounts and types of training conducted, and the amounts and types of expenditure they entail are to be included in future labour market surveys, consideration will need to be given to how enterprises can provide more reliable responses to these information requests.

CHAPTER 16. TRAINING COSTS AND EFFICIENCIES

16.1 UNIT COSTS OF TVET DELIVERY

The data sheets that record information collected from TVET providers were designed to yield sufficient up-to-date information to enable the calculation of unit costs of delivery. Five measures are useful in this context:

- Costs per course
- Costs per student enrolled in the course
- Costs per graduate
- Costs per training hour
- Costs per student training hour.

Each measure highlights a different aspect of the operations of the TVET provider.

The first three are standard measures of unit costs applicable across the whole PSET range. They can provide an indication of the impact of varying input combinations, of differences in, say, the cost of employing teaching and other staff, and of the internal efficiency of course delivery. The additional two measures also can be used for these purposes, but are more particularly applicable to the delivery of TVET courses. In higher education and other PSET programs, which are conducted on an annual or semester basis, with standard numbers of classes per week, the number of contact hours per course is often of secondary importance to their duration.

In TVET, the number of training hours involved is often more important than the period over which the course is to run. Moreover, the number of hours and type of training individual students are required to do can be modified by course administrators according to the applicants' assessed levels of prior learning and experience (hence the advertising of course lengths in terms of the *maximum* number of training involved). Moreover, estimated costs per training hour and per student training hour are particularly useful as standard measures of unit costs across the diversity of fields and levels that typically are found in TVET sectors, and in the mix of short and long courses and alternative delivery modes that are present in their delivery.

The assumptions made, and the steps taken, to estimate unit costs are outlined in Annex 6. Tables 16.1 to 16.7 show the estimates for each TVET provider for 2011.

NUS TVET

Table 16.1 NUS TVET course unit cost calculations, 2011 (WST)

School and course	Est. total cost per course	Unit cost estimates			
		per student	per graduate	per training hour	per student training hour
School of Engineering					
Certificate in Panel Beating and Spray Painting	43,325	6,189	7,221	60.6	8.7
Certificate in Tropical Horticulture	86,651	2,988	5,097	121.2	4.2
Diploma in Radio & Electronics	86,651	4,561	17,330	121.2	6.4
Intermediate Certificate in Automotive Engineering	86,651	3,209	7,221	121.2	4.5
Intermediate Certificate in Construction & Joinery	86,651	2,222	12,379	121.2	3.1
Intermediate Certificate in Electrical Engineering	43,325	1,494	6,189	60.6	2.1
Intermediate Certificate in Fitting & Machining	43,325	2,549	6,189	60.6	3.6
Intermediate Certificate in Plumbing & Sheetmetal	43,325	7,221	43,325	60.6	10.1
Intermediate Certificate in Refrigeration & Air Conditioning	43,325	2,549	8,665	60.6	3.6
Intermediate Certificate in Welding & Metal Fabrication	86,651	3,767	12,379	121.2	5.3
School of Maritime Training					
Certificate of Achievement in Maritime Training Rating 2	151,635	2,861	2,861	177.4	3.3
Certificate of Achievement in Maritime Training Rating 1	219,272	31,325	-	178.3	25.5
School of Business and General Studies					
Certificate of Tourism and Hospitality	258,318	3,355	6,798	182.6	2.4
Diploma in Business	87,706	1,415	2,829	122.7	2.0
Diploma in Journalism	87,706	2,741	10,963	122.7	3.8
Diploma in Office Management	43,853	645	1,907	61.3	0.9
Diploma in Tourism	87,706	1,566	4,385	122.7	2.2

Private providers

Table 16.2 Don Bosco course unit cost calculations, 2011 (WST)

Course	Est. total cost per course	Unit cost estimates			
		per student	per graduate	per training hour	per student training hour
Year 1					
Basic Trades Skills	285,374	2,825	4,920	285.37	2.83
Year 2					
Carpentry & Joinery	63,295	4,869	12,659	63.30	4.87
Motor Mechanics	79,063	2,137	4,941	79.06	2.14
Plumbing & Sheetmetal	71,836	2,763	11,973	71.84	2.76
Welding & Metal Fabrication	69,865	3,038	6,987	69.87	3.04

Table 16.3 LPTC course unit cost calculations, 2011 (WST)

Course	Est. total cost per course	Unit cost estimates			
		per student	per graduate	per training hour	per student training hour
Sewing & Cooking,	30,141	1,773	2,512	18.84	1.11
Fine Art,	15,269	1,697	2,545	9.54	1.06
Music	16,853	1,296	1,685	10.53	0.81
Computer	38,064	1,029	1,313	23.79	0.64
Automotive,	44,221	1,923	2,457	27.64	1.20
Welding,	26,576	3,322	4,429	16.61	2.08
Electrical	20,023	953	1,251	12.51	0.60
Carpentry	37,090	7,418	12,363	23.18	4.64

Table 16.4 UTVC course unit cost calculations, 2011 (WST)

Course	Est. total cost per course	Unit cost estimates			
		per student	per graduate	per training hour	per student training hour
Sewing & Cooking	10,099	1,443	2,020	6.31	0.90
Fine Art,	9,699	1,940	3,233	6.06	1.21
Automotive,	20,398	1,360	2,040	12.75	0.85
Welding,	10,299	1,287	-	6.44	0.80
Electrical	11,499	821	1,150	7.19	0.51
Carpentry	19,598	1,782	2,800	12.25	1.11

Table 16.5 TIAS course unit cost calculations, 2011 (WST)

Course	Est. total cost per course	Unit cost estimates			
		per student	per graduate	per training hour	per student training hour
Office Admin. & Computing	92,115	709		180	1.38
Office Admin. & Computing	60,853	724	1,068	119	1.41
Certificate in Computing	28,053	779		110	3.04
Certificate in Computing	24,319	1,621		95	6.33
Office Admin. & Computing	48,945	1,813	2,447	96	3.54

APTC

Table 16.6 APTC unit direct cost calculations (excludes overheads), 2011 (WST)

Course	Est. total cost per course*	Unit cost estimates*			
		per student	per graduate	per training hour	per student training hour
STT					
mechanical trade (fitting and machining)	508,545	39,119	31,784	508	39.1
fabrication trade (boiler-making)	420,989	11,694	18,304	414	11.5
plumbing	376,738	11,416	20,930	281	8.5
refrigeration and air-conditioning	424,219	19,283	22,327	424	19.3
SHC					
tourism operations	391,113	11,852	11,175	850	25.8
hospitality operations	427,655	9,945	10,431	737	17.1
hospitality – commercial cookery	426,376	14,703	16,399	498	17.2

*excluding college overheads

Table 16.7 APTC unit total cost calculations (includes overheads), 2011* (WST)

Course	Est. total cost per course*	Unit cost estimates*			
		per student	per graduate	per training hour	per student training hour
STT					
mechanical trade (fitting and machining)	1,295,030	99,618	80,939	1,294	99.5
fabrication trade (boiler-making)	1,072,065	29,780	46,612	1,055	29.3
plumbing	1,501,434	45,498	83,413	1,119	33.9
refrigeration and air-conditioning	1,690,660	76,848	88,982	1,689	76.8
SHC					
tourism operations	1,042,188	31,581	29,777	2,266	68.7
hospitality operations	1,139,560	26,501	27,794	1,965	45.7
hospitality – commercial cookery	1,136,152	39,178	43,698	1,327	45.8

*including college overheads

16.2 DETERMINANTS OF UNIT COST VARIATIONS

Tables 16.1 to 16.7 reveal wide variations in each of the five measures of unit costs, even within the same institution, let alone between providers. A number of factors could be expected to be at play here:

- unit costs could be varying systematically across fields of study and by level of training – with some fields by their nature requiring higher cost operations than others, and with higher levels of training requiring more expensive more resource-intensive activities;
- unit costs could be subject to economies of scale, with unit costs tending to be lower the greater the class size and the higher the student staff ratio; and
- differences in unit costs could reflect differences in the price of inputs, especially labour, in course delivery – with higher labour costs (teacher emoluments) driving unit costs higher.

If fields and levels of study were the principal reason unit costs differ in the TVET sector in Samoa, it could be expected that there would be broad similarity in unit costs within the same or similar CEDEFOP fields of training, and that courses at higher TVET qualification levels within the same fields would tend to have higher unit costs. To investigate this, Tables 16.8 to 16.11 group courses by field of training and order courses within fields by level.

What these tables appear to show is that there is little if any relationship between fields and levels of training and unit costs of delivery.

Table 16.8 Unit cost calculations for TVET courses in computer and business studies, 2011 (WST)

Institute	Level	Field	School and course	Cost per course	Cost per student	Cost per grad	Cost per training hour	Cost per student training hour
LPTC	1	482	Computer	38,064	1,029	1,313	23.79	0.64
TIAS	2	346	Office Admin. & Computing	92,115	709		179.91	1.38
TIAS	2	482	Certificate in Computing	28,053	779		109.58	3.04
TIAS	3	346	Office Admin. & Computing	60,853	724	1,068	118.85	1.41
TIAS	3	482	Certificate in Computing	24,319	1,621		95.00	6.33
NUS	5	345	Diploma in Business	87,706	1,415	2,829	122.67	1.98
NUS	5	346	Diploma in Office Management	43,853	645	1,907	61.33	0.90
TIAS	5	346	Office Admin. & Computing	48,945	1,813	2,447	95.59	3.54

Table 16.9 Unit cost calculations for TVET courses in tourism and hospitality, 2011 (WST)

Institute	Level	Field	School and course	Cost per course	Cost per student	Cost per graduat e	cost per training hour	cost per student training hour
APTC	3	811	hospitality operations	427,655	9,945	10,431	737	17.1
APTC	3	811	hospitality – commercial cookery	426,376	14,703	16,399	498	17.2
NUS	3	812	Certificate of Tourism and Hospitality	258,318	3,355	6,798	182.6	2.4
APTC	3	812	tourism operations	391,113	11,852	11,175	850	25.8
NUS	5	812	Diploma in Tourism	87,706	1,566	4,385	122.7	2.2

Table 16.10 Unit cost calculations for TVET courses in miscellaneous fields, 2011 (WST)

Institute	Level	Field	School and course	Cost per course	Cost per studen t	Cost per gradua te	Cost per trainin g hour	Cost per studen t trainin g hour
DBTC	1	010	Pre-trade Life Skills Program	285,374	2,825	4,920	285.37	2.83
LPTC	1	211	Fine Art	15,269	1,697	2,545	9.54	1.06
UTVC	1	211	Fine Art	9,699	1,940	3,233	6.06	1.21
LPTC	1	212	Music	16,853	1,296	1,685	10.53	0.81
LPTC	1	215	Sewing & Cooking,	30,141	1,773	2,512	18.84	1.11
UTVC	1	215	Sewing & Cooking	10,099	1,443	2,020	6.31	0.90
NUS	3	622	Tropical Horticulture	86,651	2,988	5,097	121.2	4.2
NUS	5	321	Journalism	87,706	2,741	10,963	122.7	3.8

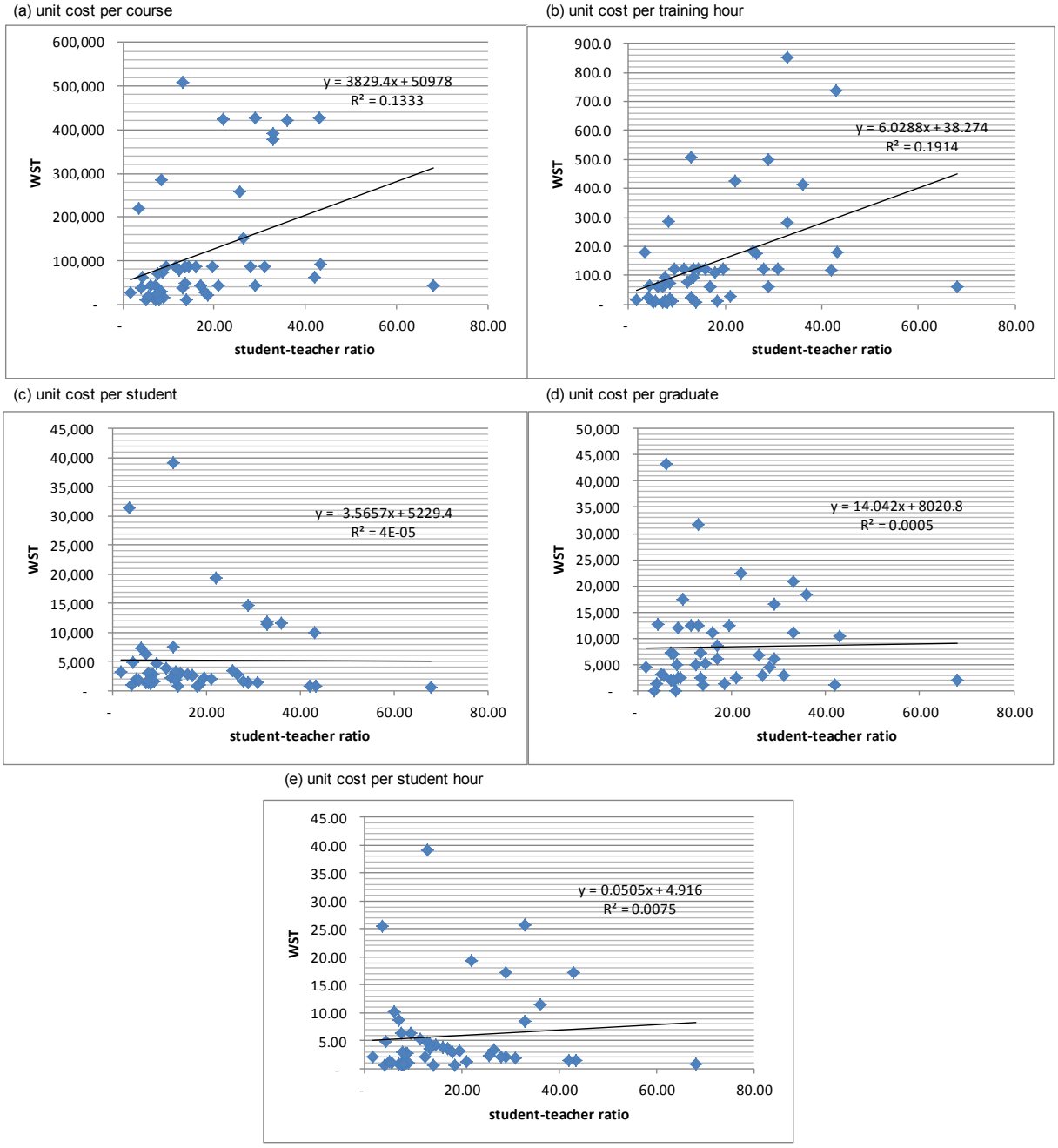
Information gathered using the data sheets, and contained in Annex 6, allow the calculation of student-staff ratios for all TVET courses offered by the six training providers. These are correlated with the five measures of unit costs in Figure 16.1.

What Figure 16.1 shows is that rather than there being evidence of economies of scale in TVET course delivery emerging from this data, if anything, unit costs of delivery tend to rise with higher class sizes.

Table 16.11 Unit cost calculations for TVET courses in mechanical, maritime, electrical and construction trades, 2011 (WST)

Institute	Level	Field	School and course	Cost per course	Cost per student	Cost per graduate	Cost per training hour	Cost per student training hour
LPTC	1	521	Welding	26,576	3,322	4,429	16.61	2.08
UTVC	1	521	Welding	10,299	1,287	-	6.44	0.80
LPTC	1	522	Electrical	20,023	953	1,251	12.51	0.60
UTVC	1	522	Electrical	11,499	821	1,150	7.19	0.51
LPTC	1	525	Automotive	44,221	1,923	2,457	27.64	1.20
UTVC	1	525	Automotive	20,398	1,360	2,040	12.75	0.85
LPTC	1	582	Carpentry	37,090	7,418	12,363	23.18	4.64
UTVC	1	582	Carpentry	19,598	1,782	2,800	12.25	1.11
DBTC	2	521	Welding and Machining	63,295	4,869	12,659	63.30	4.87
DBTC	2	521	Plumbing and Sheetmetal	71,836	2,763	11,973	71.84	2.76
DBTC	2	525	Motor Mechanics	69,865	3,038	6,987	69.87	3.04
DBTC	2	582	Carpentry and Joinery	79,063	2,137	4,941	79.06	2.14
NUS	3	521	Panel Beating and Spray Painting	43,325	6,189	7,221	60.59	8.66
APTC	3	521	Mechanical trade (fitting and machining)	508,545	39,119	31,784	508.04	39.08
APTC	3	521	Fabrication trade (boiler-making)	420,989	11,694	18,304	414.36	11.51
APTC	3	521	Plumbing	376,738	11,416	20,930	280.73	8.51
APTC	3	521	Refrigeration & air-conditioning	424,219	19,283	22,327	423.79	19.26
NUS	3	525	Cert of Achieve. in Maritime Training 2	151,635	2,861	2,861	177.35	3.35
NUS	3	525	Cert of Achieve. in Maritime Training 1	219,272	31,325	-	178.27	25.47
NUS	4	521	Inter Certificate in Fitting & Machining	43,325	2,549	6,189	60.59	3.56
NUS	4	521	Inter Certificate in Plumbing & Sheetmetal	43,325	7,221	43,325	60.59	10.10
NUS	4	521	Inter Certificate in Refrigeration & Air Con.	43,325	2,549	8,665	60.59	3.56
NUS	4	521	Inter Certificate in Welding & Metal Fabric.	86,651	3,767	12,379	121.19	5.27
NUS	4	522	Inter Certificate in Electrical Engineering	43,325	1,494	6,189	60.59	2.09
NUS	4	525	Inter Certificate in Automotive Engineering	86,651	3,209	7,221	121.19	4.49
NUS	4	582	Inter Certificate in Construction & Joinery	86,651	2,222	12,379	121.19	3.11
NUS	5	523	Diploma in Radio & Electronics	86,651	4,561	17,330	121.19	6.38

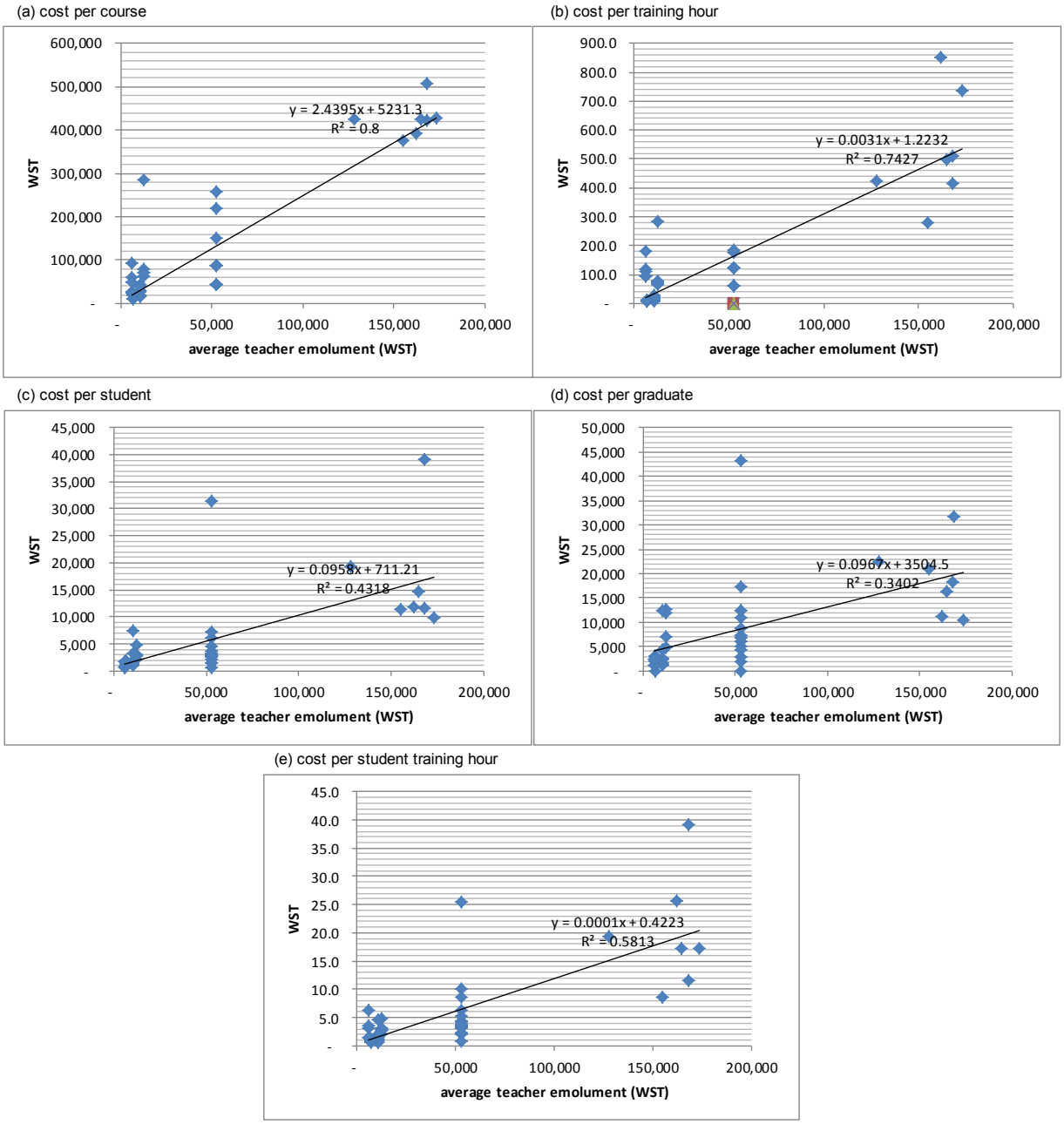
Figure 16.1 Unit costs correlated with student-teacher ratios, 2011



What unit costs of delivery appear to be most responsive to, hardly surprisingly, are variations in average annual teacher emoluments – the price of labour used in the production of TVET programs. There are essentially three quite separate labour markets in which TVET teachers are employed – TVET teachers in NUS are employed under the same terms and conditions as other NUS academics, on the same pay scales, whilst those working in the private provider sector take home substantially lower salaries and receive fewer other emoluments.

The differences appear so great that the two groups of workers can hardly be said to be competing for employment in the same market. Teachers at APTC are employees of TAFE colleges in Australia and receive Australian pay and entitlements, including offshore allowances. At this stage employment in APTC, and with these terms and conditions, is not open to Samoan TVET teachers. Figure 16.2 shows how these differences impact upon the unit costs of course delivery.

Figure 16.2 Unit costs correlated with average teacher emoluments, 2011



As to be expected there is a close association between the cost per course and the unit cost of employing a teacher (after all, a major component of putting on TVET courses is the cost of labour). Costs per training hour are also correlated with the unit cost of teacher employment, but the influence of this variable lessens when it comes to course costs per student, per graduate and per student training hour.

16.3 WHO BEARS THESE COSTS AND WHO BENEFITS?

The analysis of unit costs and the factors at play in their variability has come up with a mixed picture with respect to what can be inferred about the internal efficiency of TVET providers in Samoa. It is not possible to tell just from looking at these figures how efficiently and effectively the institutions are marshalling their resources to produce quality TVET training. To determine whether the training programs of the six providers of structured training are employing best-practice, least-cost, waste-minimising practices (including minimising drop-out and maximising continuation and successful completion rates) would require more time and resources than were available to this study.

Two further questions are raised, however – who actually bears these costs, and who benefits?

As to the former – the immediate answer is that the institutions must find the funds to meet these costs of production. But that in turn points to the sources of those funds, and prompts the further question of whether they are getting value for money.

As is evident from Chapters 12 and 14, the sources of funds for the TVET sector are:

- GoS general revenue, via MoF grants;
- development partners, principally the Government of Australia;
- church organisations backing private providers;
- students and their families via tuition and other fees;
- employers in the public and private corporate sectors; and
- purchasers of goods and services (other than training) provided by TVET institutions.

All have their particular set of expectations regarding their involvement in the financing of TVET, but with the exception perhaps of the latter group, all have an interest in the prospects of the sector's graduates. As the tables in this chapter demonstrate, the annual costs of producing those graduates vary considerably, with no discernible pattern emerging, especially with respect to the level and fields of technical and vocational skills they have been trained for.

Governments typically establish policy frameworks within which the TVET sector is expected to perform. In Samoa this is provided by the *Strategy for the Development of Samoa (SDS), 2012-2016*. However TVET is not explicitly mentioned in this document, only indirectly, as part of PSET, under *Priority Area 2 Social Policies, Key Outcome 7 Improved Focus on Access to Education, Training and Learning Outcomes, Key Indicator 3 – 'Increased employability of graduates from Post-Secondary Education Training providers'.*[51] No mention of the role of TVET in ensuring industry has sufficient supply of the types and quantities of skills it needs is made under *Priority Area 1: The Economic Sector*[52] nor is TVET given any targets in SDS Appendix 1, under any sector.

It is perhaps this seemingly low priority given to TVET outcomes by policy-makers, and the low level of industry/employer participation in the planning and funding of structured TVET provision, that the costs of producing graduates, whether they have the right sorts of skills needed by industry and whether they are able to secure jobs that match their skills, seem to receive so little scrutiny. Only one provider, the for-profit TIAS, has the direct incentive to

[51] SDS, page 12

[52] There is, however, a reference with regard the agricultural sector needing an' increased Number of graduates in agriculture/fisheries related fields', see SDS, Priority Area 1, Key Outcome 2, Key indicator 9, page 5

ensure that its graduates are meeting employer requirements, because its continued livelihood depends upon it.

Tracer studies and graduate surveys are the standard tools used to monitor the employability of graduates. APTC has regularly conducted graduate tracer surveys since its inception. The results of the third such survey was published in June 2011.[53] A total of 104 Samoans were amongst the 947 graduates who responded. Unfortunately no breakdown of their responses (nor of any graduates from the Samoan campus) is available. Nevertheless there was a high degree of unanimity in the responses on most issues, with over 90 per cent of respondents in employment at the time of the survey (between six and twelve months after graduation) and a similar percentage expressing satisfaction with the training they had received.

SQA has indicated that it has initiated attempts at tracer studies for several other PSET providers. Regular surveying of entrants and re-entrants into the labour market from all TVET providers should be a priority in any future planning for the TVET sector.

The MCIL labour market survey is conducted every three years and provides an important overall picture of trends and patterns in employment. [54] However, the surveys are conducted too infrequently to be of anything more than general use in assessing the changing nature of the skills required by employers and the employability of TVET graduates.

Calculation of the unit costs of TVET courses is an essential ingredient in conducting cost-benefit analyses for the sector, in establishing the internal rates of return (IRR) on the investment students and the country as a whole make in TVET. The other essential ingredient is data on age specific earnings differentials associated with graduating from TVET courses. With that information the value derived from unit cost calculations would be increased.

[53] APTC *Graduate Tracer Survey Report 3,* Nadi Coordination Office, June 2011.
[54] Ministry of Commerce, Industry and Labour, Labour Market Survey of Private Sector Employers in Samoa, 2011

PART V: ISSUES AND POLICY DIRECTIONS

CHAPTER 17. ISSUES AND POLICY DIRECTIONS

The study estimates that in 2011-12 around WST 27 million of funding, from all sources, went into the TVET sector in Samoa. This was equivalent to about 2.5 per cent of GDP.

This figure could actually overstate the amount spent on TVET in Samoa in 2011-12, because it includes the full costing of APTC operations, and much of that provision has a regional rather than a specifically Samoan focus. If the APTC figures were excluded the total resource allocation to Samoan TVET in 2011-12 would be around WST 20 million, or about two per cent of GDP.

While this estimate has to be heavily qualified, given the fragmented nature of TVET and limits in the data sources, the amount does seem relatively modest in light of other areas of expenditure and Samoa's economic and social needs. Government expenditure on education and training as a whole amounts to about 18 to 20 per cent of government recurrent expenditure, but of this only about 6 per cent involves spending on TVET (mainly in the form of NUS TVET and SQA). This is equivalent to just over a little more than 1 per cent of all government recurrent expenditure. The evidence suggests that government expenditure on TVET has not increased in recent years, apart from the increasing focus on quality assurance through the SQA.

The issue of government expenditure on TVET is particularly important in Samoa because other potential sources of domestic funding – students and industry – contribute comparatively small amounts of the total.

The net result is that the resources for delivery of TVET and development of new initiatives to meet emerging needs are very limited. This is turn raises challenges in the provision of high-quality TVET training and the willingness of users - students and industry - to increase their contributions, presuming that they have the capacity to do so.

This is a study of the financing of TVET in Samoa, but issues of finance cannot easily be separated from those of policy and planning. There is an adage in management that states that without proper financing there can be no effective planning, and without proper planning there can be no effective financing. This applies to TVET in Samoa as much as it does anywhere else.

17.1 ISSUES

1. No clear sense of a TVET 'system'

a) There is a lack of clear Ministerial responsibility for TVET

MESC has no direct brief for TVET and MCIL has only a marginal (to the ministry) role through managing the apprenticeship scheme. As a statutory authority SQA is making major contributions to quality improvement and monitoring, but its brief is wider than TVET and it has no leadership or management role in TVET.

b) There is no core terrain for TVET, only an upper part and a lower part

- NUS TVET programs draw their intake of students from year 13 school leavers and apprentices (who themselves have to have completed year 13). This is the same pool that NUS undergraduate programs and other PSET fine arts and religious colleges draw their new enrolments. NUS TVET offers courses only at qualification levels 3 and above.
- APTC also draws from this same pool, but the majority of its students come from other countries in the region. APTC offers courses at qualification level 3.

- The four private providers are the only ones offering places to the majority of school leavers who do not complete secondary school. (In recent times only about 40 per cent of the year 8 cohort go on to complete year 13.) Private providers primarily offer courses at qualification levels 1 and 2.

c) *There are no TVET pathways between TVET providers*
There is a lack of pathways from qualification levels 1 and 2 offered by private providers, and qualification levels offered by NUS and APTC. Nor are there any pathways out of TVET programs to qualification level 7 and beyond.

d) *There is no unified funding model for TVET*
- NUS TVET receives the bulk of its funding from internal NUS allocations. These in turn come from MoF allocations that are presented as part of the annual MESC budget estimates.
- Private providers do not receive any dedicated/targeted government grants, but they can compete with all other private providers for small grants from the annual MoF private/mission school grant fund. This is so even though their priorities and criteria for establishing needs are quite different. For the rest they have to rely on their backers, from fees and from other sources.
- APTC is almost entirely funded by the Australian Government, but not out of its bilateral assistance program for Samoa. Australia's assistance to the sector through the bilateral program is relatively small, and little of it appears to be directed to the provision or strengthening of structured TVET programs.
- Industry plays a very small role in funding structured TVET programs – except in the apprenticeship program, and representation on the SQA Board there are no formal conduits into the sector through which industry can have a voice in TVET and its delivery.

2. In public provision, a lack of clear identity

The main public provision of TVET is through NUS, a dual sector institution that arose from incorporation of the former Samoa Polytechnic (which had previously incorporated the Samoa Maritime Training School) as the Institute of Technology (IoT), and the blending together of higher education and TVET departments, staffing and funding. While such form of organisation can offer advantages, the impression is that TVET is not widely seen as having a distinctive character, a practical training culture or a special relationship with industry. Industry/employer participation in program selection, delivery and assessment appears very limited, in some instances to the point where employers are looking elsewhere for their training requirements. Public TVET is also, as a consequence, losing its point of focus for directed funding purposes.

3. Planning documents do not recognise TVET's role in developing middle-level skills

None of the key strategic planning documents – the SDS, the NUS strategy plan or the SQA strategy plan – explicitly recognize TVET's unique role in developing the middle-level skills that are at the core of the economic development of Samoa, essential to the growth of its key industries of commercial agriculture, post-harvest production, manufacturing, construction and tourism and hospitality.

At the time of writing there was no skills development strategy for Samoa, with an articulated role for TVET and industry. There were no targets, and no costings to give a sense of direction and priority.

4. Inadequate database for planning

The information base upon which such planning, if it is to be undertaken, is patchy. The EMIS being developed by SQA is good and getting better, but there is as yet no useable LMIS. Labour market information provided by the triennial MCIL labour market survey is not yet a proper planning tool. Financial reporting by TVET providers (including APTC and the private providers) is also not good enough for planning purposes. The data mapping and collections undertaken for this study have the potential to provide a framework and set of baseline data upon which future planning and monitoring could be built.

5. TVET courses on offer are conventional, mostly male-oriented and largely supply-driven

Courses provided by NUS, APTC and the private providers are drawn from across a limited range of fields, largely comprising the conventional mechanical, industrial and construction trades. With the exception of small programs in business studies, tourism and hospitality and journalism there are few opportunities for attracting females into the sector. Not one of the seven apprenticeship trades is female oriented. The only area of TVET provision that is explicitly industry-driven is that of maritime training, where courses must comply with IMO standards if their certificates are to be recognised.

6. Efficiency issues – internal and external

i) *Internal* – there is little monitoring of internal efficiency measures such as through unit cost calculations, or drop-out and completion rates. Except in the case of the for-profit provider TIAS, there do not appear to be strong incentives for providers to improve internal efficiency. TVET providers do not compete with one another for funds and/or applicants (none of them advertise). Nor do they compete with other PSET providers.

ii) *External* – little attempt has been made to gauge the effectiveness of TVET courses by surveying graduates to trace their post-training employment experiences or to canvass their views on the usefulness of the training, or by surveying employers for their perceptions.

7. No obvious TVET strategy presented to development partners

The GoS capital works program is funded almost entirely from donor grants and soft loans.

JICA was the last significant contributor to TVET infrastructure (outside APTC) and that was in 2006 with the changeover from the Samoa Polytechnic to IoT. That infrastructure needs upgrading (Japan were also the funders of the recent IT building at Don Bosco).

In recent times neither the MoF's Economic Policy and Planning Division (EPPD) nor its Aid Coordination and Debt Management Division have drawn up, nor have called the relevant agencies to draw up, a medium to long-term plan to strengthen and expand the capacity and infrastructure of TVET delivery to present to development partners. The consultations and observations in the fieldwork indicated that substantial new infrastructure is needed to lift the coverage and quality of TVET programs.

In recent years locally provided TVET has received very little donor assistance, and even this has been on a piecemeal basis. There appears to be no coordinated sector-wide approach to development across the TVET sector, or to a large extent between development partners in their approach to the sector.

8. Assistance to the sector lacks cohesion

At the time of the fieldwork, the Australian Government's assistance to the sector was via two small bilateral programs (the contribution to SICTP and the 'Roadmap' initiated TVET Program 2011-2014) and a large regional one (APTC's Samoa campus). Each program appeared to operate largely independently of the other, and there was nowhere where the three were brought together, under a single set of objectives, and assessed for their overall contribution.

There is an additional issue when assessing the financial aspects of the APTC presence in Samoa, and that is gauging just how much of it should be identified as assistance to TVET in Samoa. As has been made clear, a large part of the cost of running APTC operations in Samoa are overhead costs incurred elsewhere, in Nadi and in Australia, and the majority of the students enrolled on the Samoa campus are drawn from other countries in the region.

The cohesiveness of development partners' contribution to the TVET sector, and indeed of the sector itself, will require even more attention in light of the emerging emphasis on a sector-wide approach to funding the education sector (to embrace schools, higher education, TVET and early-childhood development).

17.2 POLICY DIRECTIONS

The data and analyses suggest several broad policy implications that would be worthy of debate and further investigation. The overarching objective should be to achieve an independent, integrated, competitive and effective TVET sector in Samoa. In achieving this objective changes in the financing of TVET – the focus of this study – are just one part, albeit a very important part, of reform. Other critical elements in the national debate about the future of TVET include its governance, structure and types of provision.

- *A need to diversify sources of funding*. The funding of TVET in Samoa is heavily dependent on government and development partners. In addition to seeking greater effectiveness in the use of current resources, growing the TVET system will require more contributions from the other beneficiaries of TVET, namely young people and their families, and employers. .However, because course fees are already high for low-income families, some other forms of private contribution would need to be investigated if access and equity are to be improved, such as payments from post-graduation earnings. Employers are only likely to be willing to contribute more funds to training, if they can be assured that their views are heard and the courses are geared to meeting labour market needs.

- *A need for funding mechanisms to reduce fragmentation and improve efficiency of resource use*. Samoa has quite a large number of different TVET elements and providers despite its small size. This fragmentation makes it hard to achieve economies of scale, improve infrastructure or provide attractive educational environments for teachers and students. The allocation of funds could be used to provide incentives for providers to merge and reduce overheads, thereby freeing up resources to modernize the types of programs provided. Funding allocations could also place a greater emphasis on programs that are able to demonstrate they are improving students' employability and meeting labour market needs.

- *A need for better evidence to guide policy and practice*. The study has indentified many gaps and limitations in the financing data and research available to assist policymakers and practitioners make better decisions. The framework developed for this study in the study could be used as the baseline for monitoring the financial

performance of TVET in Samoa, the costs of provision, and the effectiveness of resource use, and for conducting cost-effectiveness analyses of proposed policy changes, and benchmarking Samoa against comparable countries. As part of this, more effective monitoring of the outcomes of TVET as well as more independent research on what works (by linking costs and effectiveness) are also needed.

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ANNEX 1. TEMPLATES FOR DATA COLLECTION AND RECORDING (NATIONAL UNIVERSITY OF SAMOA)

Revenue

Source of funds (WST)	Financial year			
	2009/10 actual	2010/11 actual	2011/12 actual	2012/13 projected
Annual Ministry of Finance appropriations				
earmarked for TVET operations				
all other MoF appropriations				
Total MoF annual appropriations				
Direct funding (ODA) from international donors				
earmarked for TVET operations				
all other direct donor assistance				
Total direct ODA funding				
Income from student fees				
from TVET program students				
from other NUS students				
Total student fees				
Revenue from the sale of services or products				
from TVET operations				
from other NUS activities				
Total revenue from sales				
Other revenue sources				
related to TVET programs				
All other sources				
Other sources				
Total other sources				
Total annual funding- all sources				

Expenditure

Expenditure category (WST)	Financial year			
	2009/10 actual	2010/11 actual	2011/12 actual	2012/13 projected
Routine recurrent/operational budget allocation				
Wages, salaries and other staff emoluments				
salaries and other emoluments of teaching/training staff directly involved in TVET programs				
salaries and other emoluments of non-TVET program teaching staff				
wages, salaries and other emoluments of non-teaching staff (including admin, general and management staff at the faculty and central admin level)				
Total wages, salaries, etc				
Other non-labour operating costs (consumables, utilities, maintenance, etc)				
directly associated with provision of TVET programs				
incurred in non-TVET teaching programs and in non-teaching/training functions at the faculty and central admin level (eg in admin)				
Total non-labour operating costs				
Total routine recurrent budget				
Development budget (including staff development)				
development/introduction of new TVET programs and/or upgrading of existing TVET courses				
staff/professional development programs				
other development items				
Total development budget				
Capital budget (expenditure on civil works, equipment, machinery, etc)				
directly related to TVET operations				
other capital expenditure				
Total capital budget				
Total annual budget allocation – all categories				

Staffing

Staff category	Full-time equivalent staffing numbers (as at 30 June)			
	2009	2010	2011	2012
NUS academic/teaching training staff				
Teaching/training staff directly involved in TVET programs				
Other NUS teaching (academic) staff				
Total academic/teaching training staff				
NUS administrative/general support staff				
NUS administrative/general support staff				
Total NUS administrative/general support staff				
Total NUS staff – all categories				

Teaching/training staff directly involved in TVET programs	
Number of teaching weeks in a year	
Average student contact load in hours during teaching week, per staff member	
Average number of staff hours preparation time per TVET program	
Average number of staff hours assessment time per TVET program, additional to program delivery time	

TVET programs, students and graduate numbers

TVET program Name and description	Level	Program Fee (WST)	Max. no of student contact hours	Duration (e.g. 2 yrs part-time)	No. of teaching staff (full-time equiv.)	Enrolments as at 30 June 2012			Graduations for year ended 30 June 2012		
						Male	Female	Total	Male	Female	Total
Faculty Name											

ANNEX 2. TEMPLATES FOR DATA COLLECTION AND RECORDING (PRIVATE TRAINING PROVIDERS)

RESEARCH INTO THE FINANCE OF TVET IN THE PACIFIC

COUNTRY STUDY: SAMOA

DATA SHEETS FOR PRIVATE TRAINING PROVIDER

NAME OF PROVIDER:

Table 1 Annual income and expenditure on the provision of training: FY 2009/10 to 2011/12

(local currency)	Financial Year (FY)		
Revenue	**2009/10**	**2010/11**	**2011/12**
Fees charged to students			
Fees charged to employers			
Financial support from industry[55]			
Government grants			
Donor grants			
Other income[56]			
Total income			
Expenditure			
Item of Expense			
Salaries, wages and other emoluments			
Teaching/training/instructional staff[57]			
Administration, general and all other non-teaching staff			
Total staff emoluments			
Other operating expenditure			
Total recurrent expenditure			
Development expenditure[58]			
Capital expenditure[59]			
Total Expenditure			

[55] Any cash support from industry (other than payment of course fees for their workers), and support in kind if a money value can be assigned to it.
[56] Include here income from selling goods and services produced by the institution.
[57] Emoluments include salaries, wages, living allowances, leave fares, pension contributions etc.
[58] Annual expenditure on staff development, developing new courses, etc
[59] Expenditure on the purchase of items costing x local currency or more and having a useful life of one year or more., eg building extensions, equipment purchases, purchase of vehicles.

Table 2 Number of staff employed by training provider, as at 20 August 2012

Teaching year	**2009/10**	**2010/11**	**2011/12**		
Staff category	**Full-time equivalent (FTE)[60]**	**Full-time equivalent (FTE)[61]**	**Full-time[62]**	**Part-time[63]**	**Full-time equivalent (FTE)[64]**
Teaching staff (lecturers and instructors)					
Non-teaching staff (administration and general staff)					
Total number employed					

Table 3 TVET programs offered by the training provider in 2011/12[65]

TVET program/course name and description	**level[66]**	**course fee (local currency)**	**max. no of student contact hours**	**Duration (eg 2 yrs part-time)**	**no. of teaching staff (f/t equiv)**	**Total enrolments as at June 30, 2012**			**graduations for year ended June 30, 2012**		
						M	**F**	**T**	**M**	**F**	**T**

[60] A staff member employed full-time = 1FTE; a staff member employed on a half-time basis = 0.5 FTE, etc
[61] A staff member employed full-time = 1FTE; a staff member employed on a half-time basis = 0.5 FTE, etc
[62] Employed for 35 hours or more per week
[63] Employed for less than 35 hours a week or on a casual basis
[64] A staff member employed full-time = 1FTE; a staff member employed on a half-time basis = 0.5 FTE, etc
[65] Table 3 can be repeated for other years if the information can be obtained
[66] Stipulate whether certificate or diploma level or, if more precise, state which qualification framework (eg PQF)

ANNEX 3. TEMPLATES FOR DATA COLLECTION AND RECORDING (APTC)

DATA SHEET 1. Course descriptions and enrolments

program description		field of training		AQF level	max hours	Total program enrolments											
code	Course	code	Field			2009			2010			2011			2012		
						M	F	T	M	F	T	M	F	T	M	F	T
CAMPUS COUNTRY: SAMOA																	
School of trades and technology																	
Sub-total																	
School of hospitality and community services																	
Sub-total																	
TOTAL																	

APTC DATA SHEET 2. Graduations

program description		Annual successful program completions (graduates)											
code	Course	2009			2010			2011			2012		
		M	F	T	M	F	T	M	F	T	M	F	T
CAMPUS COUNTRY: SAMOA													
School of trades and technology													
Sub-total													
School of hospitality and community services													
Sub-total													
TOTAL													

APTC DATA SHEET 3. Enrolments by country of origin

program description		Total program enrolments														
code	Course	2011														
		Cook Is.	Fiji	FSM	Kiribati	Marshall Is.	Nauru	Niue	Palau	PNG	Samoa	Sol Is	Tonga	Tuvalu	Vanuatu	Total
CAMPUS COUNTRY: SAMOA																
School of trades and technology																
Sub-total																
School of hospitality and community services																
Sub-total																
TOTAL																

APTC DATA SHEET 4. Graduations by country of origin

program description		Total program completions														
code	Course	2011														
		Cook Is.	Fiji	FSM	Kiribati	Marshall Is.	Nauru	Niue	Palau	PNG	Samoa	Sol Is	Tonga	Tuvalu	Vanuatu	Total
CAMPUS COUNTRY: SAMOA																
School of trades and technology																
Sub-total																
School of hospitality and community services																
Sub-total																
TOTAL																

APTC DATA SHEET 5. Teacher/trainer data

program description		FTE staff			teacher/ instructor hours											
					preparation			course delivery			assessment			total teacher/instructor hours		
code	Course	Aust	local	total	Aust	local	total	Aust	local	total	Aust	local	total	Aust	local	total
CAMPUS COUNTRY: SAMOA																
School of trades and technology																
Sub-total																
School of hospitality and community services																
Sub-total																
TOTAL																

APTC DATA SHEET 6. College management and overhead expenditures

location	recurrent expenditure					scholarship program	development expenditure (staff development etc)	capital expenditure	total expenditure
	staff salaries and other emoluments			all other operating expenses	total recurrent expenditure				
	international staff	national staff	total all staff						
APTC general Head Office operations in Australia									
School of trades and technology									
STT management and administration									
STT program delivery (see below)									
Total STT expenditure									
School of hospitality and community services									
SHC management and administration									
SHC program delivery (see below)									
Total SHC expenditure									
Total APTC operations in Australia									
APTC general Head Office operations in Nadi									
Total APTC regional management									

APTC DATA SHEET 7. Campus operational expenditures

program description		field of training		AQF level	recurrent expenditure associated directly with program delivery				
					training staff salaries and other emoluments			all other delivery expenses	total recurrent expenditure directly associated with program delivery
code	Course	code	Field		international staff	national staff	total all training staff		
School of trades and technology									
Total STT expenditure									
School of hospitality and community services									
Total SHC expenditure									
Total APTC operations in Samoa									

ANNEX 4. TEMPLATES FOR DATA COLLECTION AND RECORDING (ENTERPRISE TRAINING EXPENDITURE SURVEY)

RESEARCH INTO THE FINANCING TVET IN THE PACIFIC
SAMOA COUNTRY STUDY

Return number: | | |

ENTERPRISE TRAINING EXPENDITURE SURVEY

Please note, that information you provide us will be treated with the strictest confidentiality, and will not be identifiable in any of the results of the survey.

NAME OF ENTERPRISE :

ADDRESS

Location … ……..
Telephone number……
Fax number……..
Email address…… ……..

NAME OF PRINCIPAL CONTACT… ……

POSITION IN ENTERPRISE: ……..

1. What type of enterprise is this?

	please tick
Government-owned business enterprise, eg SWA	
Co-operative	
Wholly Samoan-owned private company (Pty Ltd)	
Wholly Samoan-owned public company (Ltd)	
Wholly foreign- owned enterprise	
Joint venture company with mixed Samoan and foreign ownership	
Wholly Samoan NGO	
International NGO	
Religious organisation	
Other	

2. What is the main industry in which the enterprise operates?

please tick

A	Agriculture, forestry and fishing	
B	Tourism	
C	Manufacturing	
D	Electricity, gas and water supply	
E	Construction	
F	Wholesale trade	
G	Retail trade	
H	Accommodation, cafes and restaurants	
I	Transport and storage	
J	Communication services	
K	Finance and insurance	
L	Property and business services	
M	Government administration	
N	Education	
O	Health and community services	
P	Cultural and recreational services	
Q	Personal and other services	

3. Please provide estimates of the following economic indicators for the latest three financial years.

Item	Unit	2009/10	2010/11	2011/12
What was the enterprise's annual total revenue or total budget?	WST			
What percentage of this revenue came from export sales?	%			
What was the enterprise's annual 'wages bill' (i.e. its annual expenditure on wages, salaries and other employee emoluments)	WST			

4. What was the number of people employed by the establishment, as at December 31, over the last three years?

	2009	2010	2011
Full-time employees- (those working 35 hours or more a week on average)			
Females			
Males			
Sub-total			
Part-time and casual workers- (those working less than 35 hour a week on average or on contract)			
Females			
Males			
Sub-total			
All Employees			
Females			
Males			
Total			

5. Occupations - of the total number of people employed by the enterprise, how many were employed in the following occupations, in the last three years?

ISCO-08 code	Occupation	Number employed		
		2009	2010	2011
1	**Managers**			
2	**Professionals**			
3	**Technicians and associate professionals**			
4	**Clerical support workers**			
5	**Service and sales workers**			
51	Personal service workers			
52	Sales workers			
53	Personal care workers			
54	Protective services workers			
6	**Skilled agricultural, forestry and fishery workers**			
7	**Craft and related trades workers**			
71	Building and related trades workers, excluding electricians			
72	Metal, machinery and related trades workers			
73	Handicraft and printing workers			
74	Electrical and electronic trades workers			
75	Food processing, wood working, garment and other craft and related trades			
8	**Plant and machine operators, and assemblers**			
9	**Elementary occupations**			
Total				

6. What were highest levels of educational attainment of people employed by the enterprise in the last three years?

Highest level of education and training	Number employed		
	2009	2010	2011
did not complete primary school			
completed primary school			
completed secondary school			
vocational/technical certificate			
advanced vocational/technical certificate			
diploma			
bachelor's degree			
post-graduate diploma/certificate			
post-graduate degree			
Total			

7. Does the enterprise currently have an apprenticeship program? *(please tick)*

Yes	
No	

8. If yes, then how many in each of the following trades?

Automotive mechanics	
Carpentry and joinery	
Electrical	
Fitting and machinery	
Plumbing	
Refrigeration	
Welding	
Other (please specify)	
Total	

9. How many new recruits did the enterprise take on (other than as apprentices) with the following levels of prior training in the last three years?

Highest level of prior training of new recruits (other than apprentices)	Number recruited		
	2009	2010	2011
vocational/technical certificate			
advanced vocational/technical certificate			
diploma			
Total			

10. Does this enterprise conduct training programs for new recruits with these levels of prior training, in their first 12 months with the enterprise?

(please tick)

Highest level of prior training of new recruits (other than apprentices)	**Yes**	**No**
vocational/technical certificate		
advanced vocational/technical certificate		
diploma		
Total		

9. If yes to question 10, then what is the estimated average duration of that training per new employee, in hours, over the first twelve months?

No. of hours

In house structured training	
e.g. internal workshops, lectures, etc; computer assisted training programs; other enterprise conducted training courses, etc	
Structured training using external training providers	
NUS	
APTC	
Private training provider	
Industry or professional association	
Equipment and/or product manufacturer/supplier	
Other external provider (please specify)	
Unstructured training arrangements	
e.g on-the-job training as the need arises - reading manuals, journals or training notes, training through group discussion, computer-assisted unstructured training, etc	
Total hours training, on average per new employee	

10. Do employees other than new recruits receive training, e.g. as staff development, accompanying the introduction of new systems, equipment, etc?

please tick

Yes ☐ No ☐

11. If yes to question 12, then what is the estimated average duration of training per employee (other than new recruits), in hours, over the last financial year?

No. of hours

In house structured training	
e.g. internal workshops, lectures, etc; computer assisted training programs; other enterprise conducted training courses, etc	
Structured training using external training providers	
NUS	
APTC	
Private training provider	
Industry or professional association	
Equipment and/or product manufacturer/supplier	
Other external provider (please specify)	
Unstructured training arrangements	
e.g on-the-job training as the need arises - reading manuals, journals or training notes, training through group discussion, computer-assisted unstructured training, etc	
Total hours training, on average per employee (other than new recruits)	

12. **What was the estimated gross amount spent on training by this enterprise in the last financial year?**

WST

Provider costs	
Salaries, wages and other emoluments for designated training staff, managers and instructors	
Costs of equipping and operating dedicated training facilities, including training materials, utility charges, etc	
Apprenticeship training fees	
Government training levy	
Industry association training fees, levies, etc	
Fees to external training providers	
Other (please specify)	
Sub-total provider costs	
Trainee support costs	
Employees' wages and salaries while attending training	
Employees' external structured training fees	
Employees' training materials (e.g. tool kits)	
Employees' travel or accommodation costs during training.	
Other (please specify)	
Sub-total trainee support costs	
Estimated gross training expenditure in the last financial year	

13. What avenues were available in the last financial year to enable the enterprise to reduce the net cost of training?

	WST
Trainee fees	
Lower trainee wages (estimate the amount the enterprise's wages bill was reduced due to training wages being below normal wages)	
Government subsidies or incentive payments	
Other (please specify)	
Estimated total	

NO FURTHER QUESTIONS THANK YOU

……
……

OFFICE USE ONLY

Date of First Interview……

Date(s) of follow up visits……..

……
…..

Questionnaire Completed……Yes/No

ANNEX 5. COMPARING MINISTRY OF FINANCE AND NUS ESTIMATES

Table A5.1 MoF and NUS estimates of NUS revenue, 2011-12 and 2012-13

	2011-12		2012-13	
	MoF est	NUS actual	MoF est	NUS est.
government grant to NUS	**11,586,670**	**11,586,670**	**11,574,802**	**11,574,802**
deduct				
VAGST	457,535		482,850	
national opera funding	139,834		149,110	
total deductions	597,369	-	631,960	-
net government funding of NUS	**10,989,301**	**11,586,670**	**10,942,842**	**11,574,802**
other revenue sources				
student fees		6,052,287		6,200,000
sale of services or products		1,045,304		750,000
other revenue sources		1,031,093		1,200,000
all cost recovery measures	4,982,203		4,982,200	
sub-total other revenue sources	**4,982,203**	**8,128,684**	**4,982,200**	**8,150,000**
total NUS revenue from national sources	**15,971,504**	**19,715,354**	**15,925,042**	**19,724,802**
donor assistance		111,372	960,000	10,000
total avail funding for NUS	**15,971,504**	**19,826,726**	**16,885,042**	**19,734,802**
national funding difference		3,743,850		3,799,760
total revenue difference		3,855,222		2,849,760

Table A5.2 MoF and NUS estimates of NUS expenditure, 2011-12 and 2012-13

	2011-12		2012-13	
	MoF est	NUS actual	MoF est	NUS est
recurrent expenditure				
wages/salaries and other emoluments	10,073,513	12,395,411	10,038,543	13,065,878
other operational expenses	624,616		694,616	
overheads	5,273,375		5,160,383	
total other operational expenses	5,897,991	5,861,097	5,854,999	4,958,800
total recurrent expenditure	**15,971,504**	**18,256,508**	**15,893,542**	**18,024,678**
development expenditure		**95,846**		**100,000**
capital expenditure		**1,146,718**	31,500	**280,000**
total NUS expenditure	**15,971,504**	**19,499,072**	**15,925,042**	**18,404,678**
personnel difference		2,321,898		3,027,335
ops exp difference		- 36,894		- 896,199
total recurrent difference		2,285,004		2,131,136
total expenditure difference		3,527,568		2,479,636
operating surplus/deficit	**-**	**1,458,846**	**31,500**	**1,700,124**
overall surplus/deficit	**-**	**327,654**	**960,000**	**1,330,124**

Table A5.3 MoF and NUS estimates of NUS revenue earmarked for TVET operations, 2011-12 and 2012-13

	2011-12		2012-13	
	MoF est	NUS actual	MoF est	NUS actual
government funding for TVET programs	**3,500,213**	**2,360,903**	**2,955,205**	**2,358,484**
other revenue sources				
student fees		1,405,338		1,439,637
sale of services or products		242,719		174,150
other revenue sources		239,419		278,639
all cost recovery measures	1,080,800		1,080,800	
sub-total other revenue sources	**1,080,800**	**1,887,476**	**1,080,800**	**1,892,426**
total NUS revenue from national sources	**4,581,013**	**4,248,379**	**4,036,005**	**4,250,910**
donor assistance			960,000	
total avail funding for NUS	**4,581,013**	**4,248,379**	**4,996,005**	**4,250,910**
national funding difference		- 332,634		214,905
total revenue difference		- 332,634		- 745,095

Table A5.4 MoF and NUS estimates of NUS TVET expenditures, 2011-12 and 2012-13

	2011-12		2012-13	
	MoF est	NUS actual	MoF est	NUS actual
recurrent expenditure				
wages/salaries and other emoluments	3,046,669	2,793,065	2,494,909	2,944,142
other operational expenses	216,000		251,000	
overheads	1,318,344		1,290,096	
total other operational expenses	1,534,344	1,342,282	1,541,096	1,139,902
total recurrent expenditure	**4,581,013**	**4,135,347**	**4,036,005**	**4,084,045**
development expenditure		**95,846**		**100,000**
capital expenditure		**258,391**	-	**63,093**
total NUS expenditure	**4,581,013**	**4,489,584**	**4,036,005**	**4,247,137**
personnel difference		- 253,604		449,233
ops exp difference		- 192,062		- 401,194
total recurrent difference		- 445,666		48,040
total expenditure difference		- 91,429		211,132
operating surplus/deficit	**-**	**113,032**	**-**	**166,865**
overall surplus/deficit	**-**	**- 241,205**	**960,000**	**3,773**

ANNEX 6. UNIT COST ESTIMATES

Five unit cost measures are calculated for each of the TVET courses offered in 2011 by each of the provider institutions covered by this survey:

- Cost per course
- Cost per student enrolled in the course
- Cost per graduate from the course
- Cost per hour of training delivered under the course
- Cost per student training hour

The following tables are based on the information compiled by the institutions for the purposes of this study, using the data sheet templates provided. Whilst all providers were asked for essentially the same information, the templates differed to allow for different circumstances. All private providers were asked to fill in the data sheets contained in Annex 3. A different template was required for NUS because of the dual nature of the organization and the need to separate the costs involved in delivering TVET programs from the rest of the university's operations The NUS templates are shown in Annex 1. APTC differed again because the Samoan campus operations are only part of a wider regional organization that controls its finances centrally from its head office in Nadi, Fiji. APTC templates are shown in Annex 4.

Similar assumptions are made to convert the information provided by the institutions from their completed and returned data sheets.

- Personnel costs are allocated across courses on a pro-rata basis:
- Teacher costs are allocated on the basis of the number of full-time equivalent teachers per course x maximum number of hours per course per year
- Non-teaching staff costs are allocated in proportion to teaching staff costs on the assumption that teaching / non-teaching staff ratios are common across courses
- Operating costs are allocated across courses on the basis of the number of student hours per course, on the assumption that these costs (teaching materials, consumables, utilities, etc) most directly relate to the demands of teaching. Unfortunately it was not possible to apply a standard cost weighting by field of study (e.g how much more costly is a welding course to put on, in terms of materials, consumables, utilities, etc than, say, a tourism course?)
- Overhead expenses are allocated on the basis of the recurrent costs of each campus/school/course. In the case of NUS the allocation is between (a) TVET operations and those of higher education (b) schools within TVET component and (c) courses within schools. For APTC the apportionment is between (a) country campuses, (b) schools operating on each campus and (c) courses within schools. Overheads were not a factor in unit cost calculations for private provider courses.
- Development expenditure was allocated on the basis of teacher numbers, on the assumption that it mostly was on staff development.

  Capital expenditure was annualised, using the formula:[67]

  $a\ (r, n) = [r(1+r)^n]/[(1+r)^n-1]$

[67] See, for example Tilak,J.B.G., 'Measurement of Training Costs', in Tuijnman, A.C. edited *International Encyclopaedia of Adult Education and Training,* 2nd Edition, Pergamon, 1996, page 875.

where (a) is the annualisation factor, (r) is the rate of interest and (n) is the estimated life-span of the asset. In this exercise, the rate of interest was taken as 5 per cent, and the life of capital works assumed to be 25 years.

NUS

Table A6.1 NUS course duration and maximum contact hours, 2011

School and course	duration (yrs)	maximum contact hours per student			
		tuition/ training	assessment	total per course	per year
School of Engineering					
Certificate in Panel Beating and Spray Painting	1	700	15	715	715
Certificate in Tropical Horticulture	1	700	15	715	715
Diploma in Radio & Electronics	2	1,400	30	1,430	715
Intermediate Certificate in Automotive Engineering	2	1,400	30	1,430	715
Intermediate Certificate in Construction & Joinery	2	1,400	30	1,430	715
Intermediate Certificate in Electrical Engineering	2	1,400	30	1,430	715
Intermediate Certificate in Fitting & Machining	2	1,400	30	1,430	715
Intermediate Certificate in Plumbing & Sheet metal	2	1,400	30	1,430	715
Intermediate Certificate in Refrigeration & Air Conditioning	2	1,400	30	1,430	715
Intermediate Certificate in Welding & Metal Fabrication	2	1,400	30	1,430	715
School of Maritime Training					
Certificate of Achievement in Maritime Training Rating 2	1	840	15	855	855
Certificate of Achievement in Maritime Training Rating 1	1	1,200	30	1,230	1,230
School of Business and General Studies					
Certificate of Tourism and Hospitality	1	1,400	15	1,415	1,415
Diploma in Business	2	1,400	30	1,430	715
Diploma in Journalism	2	1,400	30	1,430	715
Diploma in Office Management	2	1,400	30	1,430	715
Diploma in Tourism	2	1,400	30	1,430	715

Table A6.2 NUS enrolments, graduates and student hours, 2011

School and course	students 2011			graduates, 2011
	enrolment 2011	estimated student hours per course	estimated student hours 2011	
School of Engineering				
Certificate in Panel Beating and Spray Painting	7	5,005	5,005	6
Certificate in Tropical Horticulture	29	20,735	20,735	17
Diploma in Radio & Electronics	19	27,170	13,585	5
Intermediate Certificate in Automotive Engineering	27	38,610	19,305	12
Intermediate Certificate in Construction & Joinery	39	55,770	27,885	7
Intermediate Certificate in Electrical Engineering	29	41,470	20,735	7
Intermediate Certificate in Fitting & Machining	17	24,310	12,155	7
Intermediate Certificate in Plumbing & Sheet metal	6	8,580	4,290	1
Intermediate Certificate in Refrigeration & Air Conditioning	17	24,310	12,155	5
Intermediate Certificate in Welding & Metal Fabrication	23	32,890	16,445	7
School of Maritime Training				
Certificate of Achievement in Maritime Training Rating 2	53	45,315	45,315	53
Certificate of Achievement in Maritime Training Rating 1	7	8,610	8,610	-
School of Business and General Studies				
Certificate of Tourism and Hospitality	77	108,955	108,955	38
Diploma in Business	62	88,660	44,330	31
Diploma in Journalism	32	45,760	22,880	8
Diploma in Office Management	68	97,240	48,620	23
Diploma in Tourism	56	80,080	40,040	20

Table A6.3 NUS estimated teaching staff inputs per course, 2011

School and course	teaching hours*		staff inputs		
	per course	per year	full time equiv staff per course	est. staff hours per course	est. staff hours 2011
School of Engineering					
Certificate in Panel Beating and Spray Painting	727	727	1.0	727	727
Certificate in Tropical Horticulture	727	727	2.0	1,453	1,453
Diploma in Radio & Electronics	1,453	727	2.0	2,906	1,453
Intermediate Certificate in Automotive Engineering	1,453	727	2.0	2,906	1,453
Intermediate Certificate in Construction & Joinery	1,453	727	2.0	2,906	1,453
Intermediate Certificate in Electrical Engineering	1,453	727	1.0	1,453	727
Intermediate Certificate in Fitting & Machining	1,453	727	1.0	1,453	727
Intermediate Certificate in Plumbing & Sheet metal	1,453	727	1.0	1,453	727
Intermediate Certificate in Refrigeration & Air Conditioning	1,453	727	1.0	1,453	727
Intermediate Certificate in Welding & Metal Fabrication	1,453	727	2.0	2,906	1,453
School of Maritime Training					
Certificate of Achievement in Maritime Training Rating 2	867	867	2.0	1,733	1,733
Certificate of Achievement in Maritime Training Rating 1	1,253	1,253	2.0	2,506	2,506
School of Business and General Studies					
Certificate of Tourism and Hospitality	1,427	1,427	3.0	4,280	4,280
Diploma in Business	1,453	727	2.0	2,906	1,453
Diploma in Journalism	1,453	727	2.0	2,906	1,453
Diploma in Office Management	1,453	727	1.0	1,453	727
Diploma in Tourism	1,453	727	2.0	2,906	1,453

*Includes staff contact hours plus estimated preparation and assessment time

Table A6.4 NUS estimated recurrent cost weights, 2011 (WST thousands)

	personnel cost apportioned using ratio of TVET staff from NUS data sheet setting cost of teachers = 1.00		2011-12 estimates for NUS recurrent expenditure				
Ratio: teaching cost = 1.0	**teaching**	**non-teach**	**total personal**	**op. expense**	**direct recurrent**	**o'heads**	**total recurrent**
School of Engineering	811.7	487.0	1,298.7	102.0	1,400.7	329.6	1,730.3
	1.0	0.6	1.6	0.1	1.7	0.4	2.1
School of Maritime Training	234.7	140.8	375.6	29.0	404.6	329.6	734.1
	1.0	0.6	1.6	0.1	1.7	1.4	3.1
School of Business and General Studies	689.6	413.8	1,103.4	55.0	1,158.4	329.6	1,488.0
	1.0	0.6	1.6	0.1	1.7	0.5	2.2
Olaomanu Centre	168.1	100.9	269.0	30.0	299.0	329.6	628.6
	1.0	0.6	1.6	0.2	1.8	2.0	3.7

Table A6.5 NUS estimated total annual course costs, 2011 (WST)

School and course	teacher/trainer costs		apportioned costs			est. total cost per course
	per course @ WST 28 per hour	per year @ WST 28 per hour	non-teaching staff costs	operating expenses	o'heads	
School of Engineering						
Certificate in Panel Beating and Spray Painting	20,324	20,324	12,194	2,554	8,253	43,325
Certificate in Tropical Horticulture	40,648	40,648	24,389	5,108	16,505	86,651
Diploma in Radio & Electronics	81,297	40,648	24,389	5,108	16,505	86,651
Intermediate Certificate in Automotive Engineering	81,297	40,648	24,389	5,108	16,505	86,651
Intermediate Certificate in Construction & Joinery	81,297	40,648	24,389	5,108	16,505	86,651
Intermediate Certificate in Electrical Engineering	40,648	20,324	12,194	2,554	8,253	43,325
Intermediate Certificate in Fitting & Machining	40,648	20,324	12,194	2,554	8,253	43,325
Intermediate Certificate in Plumbing & Sheet metal	40,648	20,324	12,194	2,554	8,253	43,325
Intermediate Certificate in Refrigeration & Air Conditioning	40,648	20,324	12,194	2,554	8,253	43,325
Intermediate Certificate in Welding & Metal Fabrication	81,297	40,648	24,389	5,108	16,505	86,651
School of Maritime Training						
Certificate of Achievement in Maritime Training Rating 2	48,481	48,481	29,089	5,990	68,075	151,635
Certificate of Achievement in Maritime Training Rating 1	70,106	70,106	42,064	8,662	98,440	219,272
School of Business and General Studies						
Certificate of Tourism and Hospitality	119,721	119,721	71,832	9,548	57,217	258,318
Diploma in Business	81,297	40,648	24,389	3,242	19,427	87,706
Diploma in Journalism	81,297	40,648	24,389	3,242	19,427	87,706
Diploma in Office Management	40,648	20,324	12,194	1,621	9,713	43,853
Diploma in Tourism	81,297	40,648	24,389	3,242	19,427	87,706

Table A6.6 NUS estimated unit costs 2011 (WST)

School and course	estimated total cost per course 2011	unit cost estimates			
		per student	per graduate	per training hour	per student training hour
School of Engineering					
Certificate in Panel Beating and Spray Painting	43,325	6,189	7,221	60.6	8.7
Certificate in Tropical Horticulture	86,651	2,988	5,097	121.2	4.2
Diploma in Radio & Electronics	86,651	4,561	17,330	121.2	6.4
Intermediate Certificate in Automotive Engineering	86,651	3,209	7,221	121.2	4.5
Intermediate Certificate in Construction & Joinery	86,651	2,222	12,379	121.2	3.1
Intermediate Certificate in Electrical Engineering	43,325	1,494	6,189	60.6	2.1
Intermediate Certificate in Fitting & Machining	43,325	2,549	6,189	60.6	3.6
Intermediate Certificate in Plumbing & Sheet metal	43,325	7,221	43,325	60.6	10.1
Intermediate Certificate in Refrigeration & Air Conditioning	43,325	2,549	8,665	60.6	3.6
Intermediate Certificate in Welding & Metal Fabrication	86,651	3,767	12,379	121.2	5.3
School of Maritime Training					
Certificate of Achievement in Maritime Training Rating 2	151,635	2,861	2,861	177.4	3.3
Certificate of Achievement in Maritime Training Rating 1	219,272	31,325	-	178.3	25.5
School of Business and General Studies					
Certificate of Tourism and Hospitality	258,318	3,355	6,798	182.6	2.4
Diploma in Business	87,706	1,415	2,829	122.7	2.0
Diploma in Journalism	87,706	2,741	10,963	122.7	3.8
Diploma in Office Management	43,853	645	1,907	61.3	0.9
Diploma in Tourism	87,706	1,566	4,385	122.7	2.2

PRIVATE PROVIDERS

DON BOSCO

Table A6.7 Don Bosco course details, enrolments and graduates, 2011

Course	level	course fee (WST)	max. no of student contact hours	duration	no. of teaching staff (f/t equiv)	enrol	grad
Year 1							
Basic Trades Skills	Cert. 1	700	1,000	2 yr f/t	12	101	58
Year 2							
Carpentry & Joinery	Cert. 1	700	1,000	2 yr f/t	3	13	5
Motor Mechanics	Cert.1	700	1,000	2 yr f/t	3	37	16
Plumbing & Sheet metal	Cert.1	700	1,000	2 yr f/t	3	26	6
Welding & Metal Fabrication	Cert.1	700	1,000	2 yr f/t	3	23	10

Table A6.8 Don Bosco pro-rata recurrent costs, 2011 (WST)

Course	student hours	staff hours	prorata teaching staff costs	teaching staff cost per student hour	prorata non-teaching staff costs	non-teaching staff cost per student hour	prorata operating exp	operating expt per student hour	prorata recurrent costs	recurrent cost per student hour
Year 1										
Basic Trades Skills	101,000	13,200	110,995	1.10	108,022	1.07	27,775	0.28	246,792	2.44
Year 2										
Carpentry & Joinery	13,000	3,300	27,749	2.13	27,005	2.08	3,575	0.28	58,329	4.49
Motor Mechanics	37,000	3,300	27,749	0.75	27,005	0.73	10,175	0.28	64,929	1.75
Plumbing & Sheet metal	26,000	3,300	27,749	1.07	27,005	1.04	7,150	0.28	61,904	2.38
Welding & Metal Fabrication	23,000	3,300	27,749	1.21	27,005	1.17	6,325	0.28	61,079	2.66

Table A6.9 Don Bosco pro-rata total costs, 2011 (WST)

Course	Pro-rata recurrent costs	recurrent cost per student hour	Pro-rata devel costs	devel cost per student hour	Pro-rata capital costs	capital cost per student hour	total cost per course
Year 1							
Basic Trades Skills	246,792	2.44	-	-	38,582	0.382	285,374
Year 2							
Carpentry & Joinery	58,329	4.49	-	-	4,966	0.382	63,295
Motor Mechanics	64,929	1.75	-	-	14,134	0.382	79,063
Plumbing & Sheet metal	61,904	2.38	-	-	9,932	0.382	71,836
Welding & Metal Fabrication	61,079	2.66	-	-	8,786	0.382	69,865

Table A6.10 Don Bosco estimated unit costs 2011 (WST)

Course	total cost per course	cost per hour	total cost per student hour	cost per student	cost per graduate
Year 1					
Basic Trades Skills	285,374	2,825	4,920	285.37	2.83
Year 2					
Carpentry & Joinery	63,295	4,869	12,659	63.30	4.87
Motor Mechanics	79,063	2,137	4,941	79.06	2.14
Plumbing & Sheet metal	71,836	2,763	11,973	71.84	2.76
Welding & Metal Fabrication	69,865	3,038	6,987	69.87	3.04

LPTC

Table A6.11 LPTC course details, enrolments and graduates, 2011

Course		course fee (WST)	max. no of student contact hours	Duration	no. of teaching staff (f/t equiv)	enrol	grad
Sewing & Cooking,	Cert 1	750	1600	2 yrs	2	**17**	**12**
Fine Art,	Cert 1	750	1600	2 yrs	1	**9**	**6**
Automotive,	Cert 1	750	1600	2 yrs	3	**23**	**18**
Welding,	Cert 1	750	1600	2 yrs	2	**8**	**6**
Electrical	Cert 1	750	1600	2 yrs	1	**21**	**16**
Carpentry	Cert 1	750	1600	2 yrs	3	**5**	**3**
Computer	Cert 1	750	1600	2 yrs	2	**37**	**29**
Music	Cert 1	750	1600	2 yrs	1	**13**	**10**

Table A6.12 LPTC pro-rata recurrent costs, 2011 (WST)

Course	student hours	staff hours	Pro-rata teaching staff costs	teaching staff cost per student hour	Pro-rata non-teaching staff costs	non-teaching staff cost per student hour	Pro-rata operating exp	operating expt per student hour	Pro-rata recurrent costs	recurrent cost per student hour
Sewing & Cooking,	27,200	3,200	21,066	0.77	2,341	0.09	1,917	0.07	25,324	0.93
Fine Art,	14,400	1,600	10,533	0.73	1,170	0.08	1,015	0.07	12,718	0.88
Automotive,	36,800	4,800	31,599	0.86	3,511	0.10	2,594	0.07	37,704	1.02
Welding,	12,800	3,200	21,066	1.65	2,341	0.18	902	0.07	24,309	1.90
Electrical	33,600	1,600	10,533	0.31	1,170	0.03	2,368	0.07	14,072	0.42
Carpentry	8,000	4,800	31,599	3.95	3,511	0.44	564	0.07	35,674	4.46
Computer	59,200	3,200	21,066	0.36	2,341	0.04	4,173	0.07	27,579	0.47
Music	20,800	1,600	10,533	0.51	1,170	0.06	1,466	0.07	13,169	0.63

Table A6.13 LPTC pro-rata total costs, 2011 (WST)

Course	Pro-rata recurrent costs	recurrent cost per student hour	Pro-rata devel costs	devel cost per student hour	Pro-rata capital costs	capital cost per student hour	total cost per course
Sewing & Cooking,	25,324	0.93	-	-	4,817	0.18	30,141
Fine Art,	12,718	0.88	-	-	2,550	0.18	15,269
Automotive,	37,704	1.02	-	-	6,518	0.18	44,221
Welding,	24,309	1.90	-	-	2,267	0.18	26,576
Electrical	14,072	0.42	-	-	5,951	0.18	20,023
Carpentry	35,674	4.46	-	-	1,417	0.18	37,090
Computer	27,579	0.47	-	-	10,485	0.18	38,064
Music	13,169	0.63	-	-	3,684	0.18	16,853

Table A6.14 LPTC estimated unit costs 2011 (WST)

Course	total cost per course	cost per hour	total cost per student hour	cost per student	cost per graduate
Sewing & Cooking,	30,141	18.84	1.11	1,773	2,512
Fine Art,	15,269	9.54	1.06	1,697	2,545
Automotive,	44,221	27.64	1.20	1,923	2,457
Welding,	26,576	16.61	2.08	3,322	4,429
Electrical	20,023	12.51	0.60	953	1,251
Carpentry	37,090	23.18	4.64	7,418	12,363
Computer	38,064	23.79	0.64	1,029	1,313
Music	16,853	10.53	0.81	1,296	1,685

UTVC

Table A6.15 UTVC course details, enrolments and graduates, 2011

Course	level	course fee (WST)	max. no of student contact hours	Duration	no. of teaching staff (f/t equiv)	enrol	grad
Sewing & Cooking	Cert 1	800	1600	2 yrs	1	7	5
Fine Art,	Cert 1	800	1600	2 yrs	1	5	3
Automotive,	Cert 1	800	1600	2 yrs	2	15	10
Welding,	Cert 1	800	1600	2 yrs	1	8	-
Electrical	Cert 1	800	1600	2 yrs	1	14	10
Carpentry	Cert 1	800	1600	2 yrs	2	11	7

Table A6.16 UTVC pro-rata recurrent costs, 2011 (WST)

Course	student hours	staff hours	Pro-rata teaching staff costs	teaching staff cost per student hour	Pro-rata non-teaching staff costs	non-teaching staff cost per student hour	Pro-rata operating exp	operating expt per student hour	Pro-rata recurrent costs	recurrent cost per student hour
Sewing & Cooking	11,200	1,600	6,777	0.61	1,922	0.17	1,400	0.13	10,099	0.90
Fine Art,	8,000	1,600	6,777	0.85	1,922	0.24	1,000	0.13	9,699	1.21
Automotive,	24,000	3,200	13,555	0.56	3,844	0.16	3,000	0.13	20,398	0.85
Welding,	12,800	1,600	6,777	0.53	1,922	0.15	1,600	0.13	10,299	0.80
Electrical	22,400	1,600	6,777	0.30	1,922	0.09	2,800	0.13	11,499	0.51
Carpentry	17,600	3,200	13,555	0.77	3,844	0.22	2,200	0.13	19,598	1.11

Table A6.17 UTVC pro-rata total costs, 2011 (WST)

Course	Pro-rata recurrent costs	recurrent cost per student hour	Pro-rata devel costs	devel cost per student hour	Pro-rata capital costs	capital cost per student hour	total cost per course
Sewing & Cooking	10,099	0.90	-	-	-	-	10,099
Fine Art,	9,699	1.21	-	-	-	-	9,699
Automotive,	20,398	0.85	-	-	-	-	20,398
Welding,	10,299	0.80	-	-	-	-	10,299
Electrical	11,499	0.51	-	-	-	-	11,499
Carpentry	19,598	1.11	-	-	-	-	19,598

Table A6.18 UTVC estimated unit costs 2011 (WST)

Course	total cost per course	cost per hour	total cost per student hour	cost per student	cost per graduate
Sewing & Cooking	10,099	6.31	0.90	1,443	2,020
Fine Art,	9,699	6.06	1.21	1,940	3,233
Automotive,	20,398	12.75	0.85	1,360	2,040
Welding,	10,299	6.44	0.80	1,287	-
Electrical	11,499	7.19	0.51	821	1,150
Carpentry	19,598	12.25	1.11	1,782	2,800

TIAS

Table A6.19 TIAS course details, enrolments and graduates, 2011

Course	level	course fee (WST)	max. no of student contact hours	duration	no. of teaching staff (f/t equiv)	enrol	grad
Office Admin. & Computing	Cert.2	980	512	1 Yr f/t	3	130	
Office Admin. & Computing	Cert.3	1110	512	1 Yr f/t	2	84	57
Certificate in Computing	Cert.2	770	256	1 Yr f/t	2	36	
Certificate in Computing	Cert.3	890	256	1 Yr f/t	2	15	
Office Admin. & Computing	Dip	1240	512	1 Yr f/t	2	27	20

Table A6.20 TIAS pro-rata recurrent costs, 2011 (WST)

Course	student hours	staff hours	Pro-rata teaching staff costs	teaching staff cost per student hour	Pro-rata non-teaching staff costs	non-teaching staff cost per student hour	Pro-rata operating exp	operating expt per student hour	Pro-rata recurrent costs
Office Admin. & Computing	66,560	1,536	17,868	0.27	15,464	0.23	19,070	0.29	52,402
Office Admin. & Computing	43,008	1,024	11,912	0.28	10,309	0.24	12,322	0.29	34,543
Certificate in Computing	9,216	512	5,956	0.65	5,155	0.56	5,281	0.57	16,392
Certificate in Computing	3,840	512	5,956	1.55	5,155	1.34	2,200	0.57	13,311
Office Admin. & Computing	13,824	1,024	11,912	0.86	10,309	0.75	3,961	0.29	26,182

Table A6.21 TIAS pro-rata total costs, 2011 (WST)

Course	Pro-rata recurrent costs	recurrent cost per student hour	Pro-rata devel costs	devel cost per student hour	Pro-rata capital costs	capital cost per student hour	total cost per course
Office Admin. & Computing	52,402	0.79	31,624	0.48	8,089	0.12	92,115
Office Admin. & Computing	34,543	0.80	21,082	0.49	5,227	0.12	60,853
Certificate in Computing	16,392	1.78	10,541	1.14	1,120	0.12	28,053
Certificate in Computing	13,311	3.47	10,541	2.75	467	0.12	24,319
Office Admin. & Computing	26,182	1.89	21,082	1.53	1,680	0.12	48,945

Table A6.22 TIAS estimated unit costs 2011 (WST)

	total cost per course	cost per hour	total cost per student hour	cost per student	cost per graduate
Office Admin. & Computing	92,115	180	1.38	709	
Office Admin. & Computing	60,853	119	1.41	724	1,068
Certificate in Computing	28,053	110	3.04	779	
Certificate in Computing	24,319	95	6.33	1,621	
Office Admin. & Computing	48,945	96	3.54	1,813	2,447

APTC

Table A6.23 APTC program costs and management overheads, 2011 (WST)

WST	STT	SHC	Total
college regional management pro-rata			2,260,020
Samoa campus management			1,517,052
total college pro-rata overhead	**2,247,767**	**1,529,305**	**3,777,071**
school management and administration	-	414,466	414,466
sub-total management and overheads	**2,247,767**	**1,943,771**	**4,191,538**
program delivery	3,311,422	1,632,821	4,944,242
Total APTC Samoa	**5,559,188**	**3,576,592**	**9,135,780**

Table A6.24 Recurrent expenditure on STT programs, and allocation of overheads, 2011 (WST)

STT sections and courses	total recurrent	overheads	total recurrent
manufacturing			
pro-rata school overhead	957,096	-	-
section overhead	480,465	-	-
total overhead	**1,437,561**	-	-
engineering – mechanical trade (fitting and machining)	508,545	786,485	1,295,030
engineering – fabrication trade (boiler-making)	420,989	651,076	1,072,065
total programs	929,534	1,437,561	2,367,095
total manufacturing	**2,367,095**	**1,437,561**	**2,367,095**
construction	-	-	-
pro-rata school overhead	1,290,671	-	-
section overhead	1,100,466	-	-
total overhead	**2,391,137**	-	-
plumbing	376,738	1,124,696	1,501,434
engineering –refrigeration and air-conditioning	424,219	1,266,441	1,690,660
total programs	**800,957**	**2,391,137**	**3,192,093**
total construction	**3,192,093**	**2,391,137**	**3,192,093**
total STT	**5,559,188**	**3,828,698**	**5,559,188**

Table A6.25 Recurrent expenditure on SHC programs, and allocation of overheads, 2011 (WST)

SHC sections and courses	total recurrent	overheads	total recurrent
tourism and hospitality School Costs			
pro-rata school overhead	1,791,589	-	-
section overhead	281,618	-	-
total overhead	**2,073,207**	-	-
tourism operations	391,113	651,075	1,042,188
hospitality operations	427,655	711,905	1,139,560
hospitality – commercial cookery	426,376	709,776	1,136,152
hospitality supervision	-	-	-
patisserie	271	451	721
total programs	**1,245,414**	**2,073,207**	**3,318,621**
total tourism and hospitality	**3,318,621**	**2,073,207**	**3,318,621**
health and community services			
pro-rata school overhead	152,182	-	152,182
section overhead	-	-	-
total overhead	**152,182**	**-**	**152,182**
children Services	47,351	-	47,351
disability Work	58,437	-	58,437
total programs	**105,789**	**-**	**105,789**
total health and community services	**257,971**	**-**	**257,971**
total SHC	**3,576,592**	**2,073,207**	**3,576,592**

Table A6.26 APTC Samoa course enrolments graduations and training hours, 2011

course	max.hours	enrolments	graduates	student hours
STT				
engineering – mechanical trade (fitting and machining)	1,001	13	16	13,013
engineering – fabrication trade (boiler-making)	1,016	36	23	36,576
plumbing	1,342	33	18	44,286
engineering –refrigeration and air-conditioning	1,001	22	19	22,022
total STT		**104**	**76**	**115,897**
SHC				
tourism operations	460	33	35	15,180
hospitality operations	580	43	41	24,940
hospitality – commercial cookery	856	29	26	24,824
hospitality supervision				
patisserie				
children services				
disability work				
total SHC		**105**	**102**	**64,944**
Total APTC		**209**	**178**	**180,841**

Table A6.27 APTC estimated unit costs 2011 (WST)

	cost per course		unit costs							
	direct	direct plus institution overheads	per student		per training hour		per student training hour		per graduate	
			direct	total	direct	total	direct	total	direct	total
School of trades and technology										
Mechanical trade (fitting and machining)	508,545	1,295,030	39,119	99,618	508	1,294	39.1	99.5	31,784	80,939
Fabrication trade (boiler-making)	420,989	1,072,065	11,694	29,780	414	1,055	11.5	29.3	18,304	46,612
Plumbing	376,738	1,501,434	11,416	45,498	281	1,119	8.5	33.9	20,930	83,413
Refrigeration and air-conditioning	424,219	1,690,660	19,283	76,848	424	1,689	19.3	76.8	22,327	88,982
School of hospitality and community services										
Tourism operations	391,113	1,042,188	11,852	31,581	850	2,266	25.8	68.7	11,175	29,777
Hospitality operations	427,655	1,139,560	9,945	26,501	737	1,965	17.1	45.7	10,431	27,794
Hospitality – commercial cookery	426,376	1,136,152	14,703	39,178	498	1,327	17.2	45.8	16,399	43,698

ANNEX 7. CLASSIFICATION AND CODING SYSTEMS USED IN DATA COLLECTION AND RECORDING

International classification and coding systems were applied in this study for the following variables:

- Fields of training
- Occupations
- Industries

Fields of training

0. General Programs
010 Basic programs
080 Literacy and numeracy
090 Personal development

1. Education
141 Teaching and training
142 Education science

2. Humanities and the arts
211 Fine arts
212 Music and performing arts
213 Audio-visual techniques and media production
214 Design
215 Craft skills
221 Religion and theology
222 Foreign languages and cultures
223 Mother tongue
224 History, philosophy and related subjects

3. Social sciences, business and law
310 Social and behavioural science
321 Journalism and reporting
322 Library, information, archive
341 Wholesale and retail sales
342 Marketing and advertising
343 Finance, banking, insurance
344 Accounting and taxation
345 Management and administration
346 Secretarial and office work
347 Working life
380 Law

4. Science
420 Life science
440 Physical science
460 Mathematics and statistics
481 Computer science
482 Computer use

5. Engineering, manufacturing and construction
521 Mechanics and metal work
522 Electricity and energy
523 Electronics and automation
524 Chemical and process
525 Motor vehicles, ships and aircraft
541 Food processing
542 Textiles, clothes, footwear, leather
543 Materials (wood, paper, plastic, glass)
544 Mining and extraction
581 Architecture and town planning
582 Building and civil engineering

6. Agriculture
621 Crop and livestock production and fishery
622 Horticulture
623 Forestry
624 Fisheries
640 Veterinary

7. Health and welfare
721 Medicine
722 Medical services
723 Nursing
724 Dental studies
761 Child care and youth services
762 Social work and counselling

8. Services
811 Hotel, restaurant and catering
812 Travel, tourism and leisure
813 Sports
814 Domestic services
815 Hair and beauty services
840 Transport services
850 Environmental protection
861 Protection of property and persons
862 Occupational health and safety
863 Military

9. Not known

Source: European Centre for the Development of Vocational Training (CEDEFOP) *Fields of Training Manual*, Eurostat, 1999,

Occupations

1. Managers

11 Chief executives, senior officials and legislators
12 Administrative and commercial managers
13 Production and specialised services managers
14 Hospitality, retail and other services managers

2. Professionals
21 Science and engineering professionals
22 Health professionals
23 Teaching professionals
24 Business and administration professionals
25 Information and communications technology professionals
26 Legal, social and cultural professionals

3. Technicians and associate professionals
31 Science and engineering associate professionals
32 Health associate professionals
33 Business and administration associate professionals
34 Legal, social, cultural and related associate professionals
35 Information and communications technicians

4. Clerical support workers
41 General and keyboard clerks
42 Customer services clerks
43 Numerical and material recording clerks
44 Other clerical support workers

5. Service and sales workers
51 Personal service workers
52 Sales workers
53 Personal care workers
54 Protective services workers

6. Skilled agricultural, forestry and fishery workers
61 Market-oriented skilled agricultural workers
62 Market-oriented skilled forestry, fishing and hunting workers
63 Subsistence farmers, fishers, hunters and gatherers

7. Craft and related trades workers

71 Building and related trades workers, excluding electricians
72 Metal, machinery and related trades workers
73 Handicraft and printing workers
74 Electrical and electronic trades workers
75 Food processing, wood working, garment and other craft and related trades workers

8. Plant and machine operators, and assemblers

81 Stationary plant and machine operators
82 Assemblers
83 Drivers and mobile plant operators

9. Elementary occupations

91 Cleaners and helpers
92 Agricultural, forestry and fishery labourers
93 Labourers in mining, construction, manufacturing and transport
94 Food preparation assistants
95 Street and related sales and service workers
96 Refuse workers and other elementary workers

10. Armed forces occupations

01 Commissioned armed forces officers
02 Non-commissioned armed forces officers
03 Armed forces occupations, other ranks

Source: ILO International Standard Classification of Occupations, 2008 (ISCO-08).

Industries

- Agriculture, Forestry and Fishing
- Mining
- Manufacturing
- Electricity, Gas and Water Supply
- Construction
- Wholesale Trade
- Retail Trade
- Accommodation, Cafes and Restaurants
- Transport and Storage
- Communication Services
- Finance and Insurance
- Property and Business Services
- Government Administration and Defence
- Education
- Health and Community Services
- Cultural and Recreational Services
- Personal and Other Services

Source: ABS, Australian and New Zealand Standard Industry Classification (ANZSIC), 1993.

ANNEX 8. PERSONS CONSULTED IN SAMOA DURING THE FIELDWORK

NAME	ORGANISATION	ROLE
Hinauri Petana	Samoa Qualifications Authority	Chairperson Samoa Qualifications Authority Board
Fepulea'i Sinapi Moli	Samoa Qualifications Authority	Chief Executive Officer (CEO)
Kovi Fonoti-Aiolupotea	Samoa Qualifications Authority	Assistant CEO Quality Assurance
Leapai Iaoa Lau Professor Asofou So'o	National University of Samoa	Vice Chancellor and President
Dr Emma Kruse Vaai	National University of Samoa	Deputy Vice-Chancellor
Taito John Roach	National University of Samoa	Director of Financial Services
Saulaulu U Moananu	National University of Samoa	Assistant Director of Financial Services
Luagalau F Eteuati-Shon	National University of Samoa	Registrar
Tauvaga Va'ai	National University of Samoa	Acting Director Oloamanu Centre
Leitufiaoatua Fatu Lafoai	National University of Samoa	Head of School of Maritime Training
Dr Desmond Amosa	National University of Samoa	Dean Faculty of Business & Entrepreneurship
Sui Timoteo Tinai	National University of Samoa	Head of School for Management, Tourism & Hospitality
James Ah Fook	National University of Samoa	Lecturer for Dept. of Electro-Engineering
Peseta Noumea Simi	Ministry of Finance	Assistant CEO -
Leasiosiofa'asisina Oscar Malielegaoi	Ministry of Finance	Assistant CEO - Budget
Muagututi'a Sifuiva Reupena	Samoa Bureau of Statistics	CEO
Malaefono Faafeu Taaloga	Samoa Bureau of Statistics	Assistant CEO - Demographic & Survey Statistics
Galumalemana Nu'ufou Petaia	Ministry of Education, Sports & Culture	CEO
Sa'u Taupisioletoga Fa'amau	Ministry of Commerce, Industry and Labour	ACEO Apprenticeship, Employment & Labour Market
Tanuvasa Fa'amanatu Solomona	Ministry of Commerce, Industry and Labour	Principal Inspector of Apprentices
Father Mosese	Don Bosco (Salelologa)	Principal
Luteru Loli	Uesiliana Technical Center	Principal
Asiasiga	Tuasivi College	Principal

NAME	ORGANISATION	ROLE
Sister Monika Vaipuna	Don Bosco (Alafua)	Principal
Adi Tafuna'i	Women In Business Development Corp.	Director
Joshua Newton	Hyundai Automotive Samoa	Director
Emoni Togamau Tesese	Tesese Institute of Administrative Studies	Director
Funefeai Oliva Va'ai	Yazaki Samoa	Manager
Ruby Va'a	University of South Pacific	Campus Director CCE
Barry Peddle	APTC Nadi, Fiji	CEO
Jenny Dehn	APTC Nadi, Fiji	Manager Administration
Frances Howes	APTC Samoa	Campus Manager
Anthony Stannard,	Australian High Commission	Counsellor, Development Cooperation
Valma Galuvao	AusAID	Senior Program Manager, Education & Scholarships
Pepe Leuela	AusAID	Program Administrator

ANNEX 9. ROLE AND MEMBERSHIP OF THE NATIONAL REFERENCE GROUP

Role of the National Reference Group

The role of the NRG was to assist, advise and support the activities of the country study:

- advise on country-specific TVET financing issues;
- advise on implementation of the research program in the country;
- encourage and facilitate stakeholder engagement in the program;
- provide feedback on such data collection instruments and interview schedules that the country research team are employing;
- provide feedback on the draft country study report;
- participate in the final country-specific dissemination workshop;
- participate in the research program's regional forum (some members); and
- assist with dissemination of the program's findings and reports.

Membership of the NRG

- Susuga Hinauri Petana (Chairperson)
- Leapai Ilaoa Lau Professor Asofou So'o, Vice Chancellor and President, National University of Samoa
- Seiuli Paul Wallwork, Representative Non-Government Schools and Institutions
- Auelua Taito Samuelu Enari, Chief Executive Officer, Ministry of Commerce, Industry and Labour
- Lisa Vaai, Representative, Samoa Association of Manufacturers and Exporters
- Leituala Kuiniselani Toelupe Tago, Chief Executive Officer Ministry of Women, Community and Social Development
- Lemalu Sina Lima, Representative, Samoa Chamber of Commerce
- Galumalemana Nuufou Petaia, Chief Executive Officer, Ministry of Education, Sports and Culture.
- Fepulea'i Sinapi Moli, Chief Executive Officer, Samoa Qualifications Authority

Plus one representative each from:

- Ministry of Finance
- Samoa Bureau of Statistics

NRG meetings

The NRG met formally twice during the mission - July 26 and September

The project *Research into the Financing of Technical and Vocational Education and Training (TVET) in the Pacific* was managed by the Australian Council for Educational Research (ACER) and Scope Global on behalf of the Australian Government. The project was undertaken between 2012 and 2014 under contract to the Australian Government, initially through AusAID and then the Department of Foreign Affairs and Trade (DFAT).

The study was conducted in seven Pacific countries: Fiji; Kiribati; Papua New Guinea; Samoa; Solomon Islands; Tonga; and Vanuatu. The aims of the research were to produce, in conjunction with host country governments and TVET stakeholders, comprehensive analyses of the systems for financing TVET and discussions of policies through which the financing of TVET could be made more efficient and effective. This volume is one of the seven country reports produced by the study.

ISBN 978-1-74286-273-6

Australian Government
Department of Foreign Affairs and Trade