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SUPPLY-SIDE CONSTRAINTS IN SKILLS DEVELOPMENT: A CRITICAL REFLECTION ON EDUCATION PROVIDERS IN UZBEKISTAN'S HOSPITALITY SECTOR

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Abstract. *This article offers a critical reflection on the study Mapping the Education Landscape: Results of a study on education providers' training in the hospitality sector in Uzbekistan (Renold, Palayil, & Caves, 2025). As a companion to earlier demand-side research on employer willingness to train, this study provides an unprecedented supply-side analysis of vocational education providers in Uzbekistan's rapidly expanding hospitality sector. Drawing on survey data from 32 public institutions—including Monocenters, universities, and VET colleges—the original study maps program offerings, skills gaps, training practices, and cooperation patterns. While the study makes significant empirical contributions, this review argues that its findings require deeper critical engagement. Key areas for interrogation include: (1) the institutional fragmentation of Uzbekistan's VET landscape; (2) the misalignment between provider preferences and employer needs regarding training design; (3) the under-theorized role of governance in shaping institutional behavior; and (4) the tension between international benchmarking and local relevance. By situating the study within broader debates on VET reform in transitional economies, this reflection advances a research agenda focused on the political economy of skills formation, the institutionalization of social partnership, and the conditions necessary for effective dual education systems.*

Keywords: *vocational education and training (VET), dual education, skills development, hospitality sector, Uzbekistan, institutional analysis, governance, education providers*

INTRODUCTION

Uzbekistan's tourism and hospitality sector has experienced remarkable growth, with over 6.5 million international tourists arriving in the first ten months of 2024—a 17.2% increase year-on-year (Uzbekistan State Committee on Statistics, 2024). This expansion, driven by strategic investments in infrastructure, visa liberalization, and international connectivity, has placed unprecedented demands on the country's education system to produce a skilled, adaptable workforce. Recognizing the critical role of human capital in sustaining this growth, the Uzbek government has initiated a series of ambitious reforms, including Presidential Decree No. 158 (2024) mandating curriculum modernization and Presidential Resolution No. PP-345 (2024) strengthening the National Qualifications Framework.

Against this backdrop, the Chair of Education Systems (CES) at ETH Zurich, in partnership with Helvetas Uzbekistan, has conducted a multi-phase research program examining the intersections of education, skills, and employment. The first phase focused on employer demand, resulting in the *Willingness to Train* (WTT) study (Renold, Caves, & Palayil, 2024), which documented pervasive skills shortages and limited employer-provided training. The second phase, *Mapping the Education Landscape* (Renold, Palayil, & Caves, 2025), shifts attention to the supply side, providing the first comprehensive survey of education providers in Uzbekistan's hospitality sector.

The original study is methodologically rigorous and empirically valuable. It surveys 32 public institutions—10 Monocenters, 11 universities, and 11 VET colleges—achieving a 64% response rate. It examines program offerings, skills gaps, training practices, cooperation patterns, and preferences for new training programs using a discrete choice experiment. The findings reveal a complex landscape: institutions offer diverse programs reflecting their institutional mandates, but significant gaps exist between provider perceptions and employer needs. Notably, while 79% of providers report offering training in collaboration with companies, 61% of hotels in the WTT study offer no structured training, suggesting a fundamental disconnect in the education-employment nexus.

This review seeks to critically engage with the original study's findings, moving beyond descriptive summary to interrogate the structural, institutional, and political-economic factors that shape Uzbekistan's VET landscape. By drawing on comparative VET literature, institutional theory, and online policy sources, this reflection aims to (1) identify the governance deficits underlying the observed misalignments; (2) critically assess the recommendations proposed; and (3) propose a more theoretically informed research agenda for VET reform in transitional economies.

STRENGTHS AND CONTRIBUTIONS OF THE ORIGINAL STUDY

The original study makes several significant contributions to the literature on VET in developing contexts. First, it addresses a critical gap in empirical research on the supply side of skills formation. Most VET research in low- and middle-income countries focuses on employer demand or aggregate outcomes, with limited attention to the internal dynamics of education providers (McGrath et al., 2020; Allais, 2017). By systematically mapping the programs, practices, and partnerships of three distinct institutional types, the study provides an invaluable baseline for policy and further research.

Second, the study's methodological design is exemplary. The use of a discrete choice experiment to elicit provider preferences for new training programs represents a sophisticated approach that allows for causal inference about the attributes that drive institutional decision-making. This methodology, adapted from behavioral economics (Louviere, Hensher, & Swait, 2000), is rarely applied in VET research in developing countries, and its deployment here sets a new standard for the field.

Third, the comparative dimension of the study—juxtaposing supply-side findings with demand-side results from the WTT study—reveals critical mismatches that have direct policy relevance. The finding that employers prioritize soft skills and workplace learning while institutions emphasize theoretical knowledge and retain control over program design illuminates the core challenge facing VET reform in Uzbekistan.

Fourth, the study's engagement with recent policy developments, including Presidential Decree No. 158 and Resolution No. PP-345, grounds the analysis in the contemporary reform context. This policy alignment enhances the study's relevance for decision-makers and positions it as a timely contribution to ongoing debates.

CRITICAL REFLECTIONS

Despite its strengths, the original study invites critical reflection on several fronts. This section organizes the critique into four interconnected themes: (1) institutional fragmentation and the challenge of system coherence; (2) the governance deficit in education-employment linkage; (3) the

paradox of provider preferences; and (4) the tension between international benchmarking and local relevance.

Institutional Fragmentation: Monocenters, Universities, and the Missing Middle

A central finding of the original study is that Uzbekistan's hospitality education landscape is characterized by institutional diversity without systemic coherence. Monocenters (soon to be Vocational Skills Centers) focus on short-term, practical courses for adults; universities emphasize academic and managerial programs; and VET colleges (Technikums) provide specialized, applied training for secondary-level students. The study notes that "program names often overlap across institution types, even though their content and competencies vary significantly" (Renold et al., 2025, p. 5), leading to confusion among employers and students.

This fragmentation is not merely an administrative inconvenience; it reflects deeper structural issues rooted in the historical evolution of Uzbekistan's education system. The Soviet legacy of centralized, siloed vocational education—with sharp divisions between academic and vocational tracks—continues to shape institutional identities and practices (Heyneman, 2010; DeYoung, 2006). The recent reforms, while ambitious, have not fundamentally addressed the underlying fragmentation. As the original study acknowledges, "there is currently no formal distinction between academic and applied types of higher education institutions in the country" (Renold et al., 2025, p. 8).

A critical perspective suggests that this fragmentation constrains the development of coherent career pathways in the hospitality sector. In established dual education systems, such as Switzerland's, a clear distinction between academic universities and Universities of Applied Sciences enables permeability and mobility between educational tracks (Gonon, 2021; Bonoli, 2020). The absence of such differentiation in Uzbekistan may limit students' ability to progress from short-term Monocenter courses to longer-term qualifications, or from applied VET programs to higher education.

Moreover, the study's finding that universities—not VET colleges—are the most common partners for workplace training in hotels (Renold et al., 2025, p. 8) suggests a paradoxical situation: employers prefer to partner with institutions whose primary mission is academic rather than applied. This may reflect perceptions of quality (universities are seen as more prestigious) or practical constraints (universities may have better-established industry networks). However, it also indicates that the applied institutions—Monocenters and VET colleges—are not fulfilling their intended role as the primary conduits for workforce development.

The Governance Deficit: Social Partnership as Missing Architecture

The original study identifies significant gaps in cooperation between education providers and employers. While 79% of institutions report offering some form of training in collaboration with companies, the nature and quality of this collaboration are unclear. The study notes that "common barriers include lack of time, unclear responsibilities, and concerns over training quality" (Renold et al., 2025, p. 6). These barriers are not merely operational; they reflect a deeper governance deficit.

In comparative VET research, the effectiveness of dual education systems is widely attributed to institutionalized social partnership—the formal, legally anchored cooperation between state authorities, employer associations, and education providers (Busemeyer & Trampusch, 2012; Thelen, 2004). In Switzerland and Germany, employer associations play a central role in developing occupational standards, designing curricula, and certifying training outcomes. This collective governance mechanism reduces transaction costs, ensures quality, and aligns training with labor market needs (Muehlemann & Wolter, 2019).

In Uzbekistan, such collective structures are nascent or absent. The original study notes that "industry associations in Uzbekistan need to be strengthened" (Renold et al., 2025, p. 15), but does not explore why they are weak or how they might be built. A critical perspective would examine the political economy of employer organization: are employers sufficiently organized to speak with one voice? Do they have the capacity and resources to engage in collective governance? What incentives exist for employers to invest in training when the risk of poaching is high?

The study's finding that "companies are the main partners across all institution types" (Renold et al., 2025, p. 17) suggests a bilateral, firm-by-firm model of cooperation rather than a collective, system-level partnership. This bilateral model is inherently unstable: it depends on individual relationships rather than institutionalized structures, and it is vulnerable to changes in management, economic conditions, or firm priorities. For dual education to become sustainable, Uzbekistan must develop the collective governance infrastructure that underpins successful systems elsewhere.

The Paradox of Provider Preferences: Control Without Capacity

The discrete choice experiment in the original study yields a striking finding: education providers prefer programs where they retain control over the education-employment linkage and where students spend less time in the workplace (Renold et al., 2025, p. 21). This preference is interpreted as "understandable" given the loose cooperation between education and industry (p. 21), but the implications merit deeper critical scrutiny.

At first glance, the preference for control reflects rational institutional self-interest: providers seek to protect their autonomy and maintain their role in the education system. However, this preference also suggests a fundamental misalignment with employer needs. As the WTT study found, employers prefer programs with greater employer leadership, shorter durations, and older participants (Renold et al., 2024, p. 24). Moreover, both employers and providers agree that the most important skills—problem-solving, reliability, practical skills—are best learned in the workplace (Renold et al., 2025, p. 20).

The paradox is that providers acknowledge the importance of workplace learning but prefer programs with less of it. This tension points to a critical capacity gap: providers may lack the institutional capacity to manage workplace-based learning effectively. In established dual systems, schools and employers share responsibility for training, with clear roles, quality assurance mechanisms, and support structures for in-company trainers (Gessler, 2017). In Uzbekistan, these support structures are largely absent. Providers may therefore prefer classroom-based instruction not because it is pedagogically superior, but because it is within their control and capacity to deliver.

This interpretation is reinforced by the study's finding that "most training companies do not cooperate with other companies, TVET schools, or intermediaries" (Renold et al., 2025, p. 25). Without collective coordination mechanisms, individual institutions face high transaction costs in arranging workplace placements, monitoring quality, and ensuring consistency. The preference for control may thus reflect not ideological resistance to employer engagement but practical constraints on institutional capacity.

International Benchmarking vs. Local Relevance

The original study makes extensive reference to international benchmarks, particularly the Swiss VET system. It recommends that Uzbekistan "formally differentiate between academic universities and practice-oriented institutions, maybe by introducing 'Universities of Applied

Sciences' to align with international standards" (Renold et al., 2025, p. 7). It also suggests introducing Professional Education and Training (PET) programs modeled on Swiss practice.

While international benchmarking is valuable, it also carries risks. The assumption that institutional models can be transferred across vastly different economic, political, and cultural contexts is questionable (Phillips & Ochs, 2003; Steiner-Khamsi, 2004). Switzerland's dual education system is the product of a unique historical trajectory, characterized by strong craft traditions, decentralized governance, and dense employer associations (Gonon, 2021). These conditions are not easily replicated in a country like Uzbekistan, which has a different history, different institutional legacies, and different political economy.

A critical perspective would argue that international benchmarking should be used not to prescribe specific institutional forms but to identify underlying principles that can be adapted to local conditions. The principle of social partnership—collective, institutionalized cooperation between state, employers, and education providers—is more fundamental than the specific institutional form it takes. Similarly, the principle of competency-based curricula that respond to labor market needs is more important than the precise structure of program duration or qualification formality.

The study's recommendation that "training programs should be co-developed with local industry stakeholders" (Renold et al., 2025, p. 7) is sound, but it does not adequately address the question of *how* to build the institutional capacity for such co-development. Industry stakeholders cannot be "engaged" if they do not exist as organized, representative bodies. Building employer associations is a long-term, institution-building task that requires sustained investment and political commitment.

SITUATING THE STUDY IN BROADER DEBATES

The original study contributes to several broader debates in the field of VET and skills development. This section situates the findings within these debates, drawing on relevant literature and online sources.

The Political Economy of VET Reform

Research on VET in transitional economies has increasingly emphasized the political economy of reform—the ways in which interests, institutions, and power dynamics shape policy outcomes (Allais, 2017; McGrath et al., 2020; Keevy, 2020). Uzbekistan's current VET reforms are taking place in a context of centralized state authority, limited civil society, and weak employer organization. The original study's focus on institutional practices and preferences, while valuable, does not fully capture these political dynamics.

Online sources suggest that Uzbekistan's reform process has been top-down, driven by presidential decrees rather than broad stakeholder consensus (Eurasianet, 2024; TCA, 2025). While such centralization can enable rapid policy change, it may also limit the development of the decentralized, collective governance structures that underpin successful dual systems. The challenge for Uzbekistan is to balance the efficiency of centralized reform with the need for local ownership and stakeholder engagement.

The Role of Employer Associations

The original study's findings underscore the critical importance of employer associations in VET governance. In the WTT study, employers expressed interest in training but lacked the collective structures to coordinate provision (Renold et al., 2024). In the supply-side study, providers expressed

willingness to cooperate but faced barriers related to unclear roles and responsibilities (Renold et al., 2025).

International experience suggests that strong employer associations are a prerequisite for effective dual education (Busemeyer & Trampusch, 2012; Culpepper, 2003). These associations perform multiple functions: they aggregate employer interests, develop occupational standards, coordinate training provision, and represent the private sector in policy negotiations. In countries like Switzerland, professional organizations (Berufsorganisationen) are legally mandated to perform these functions (Gonon, 2021).

Uzbekistan's hospitality sector has an Association of Hoteliers, which played a key role in facilitating the WTT and supply-side studies. However, the capacity and reach of this association remain limited. As the original study notes, "industry associations in Uzbekistan need to be strengthened" (Renold et al., 2025, p. 15). Building this capacity should be a priority for reform.

Soft Skills and Work-Based Learning

A consistent finding across both studies is the importance of soft skills—problem-solving, reliability, teamwork—and the recognition that these skills are best learned in the workplace. This finding aligns with a growing body of international research emphasizing the limitations of classroom-based instruction for developing interpersonal and adaptive competencies (Cedefop, 2024; Schleicher, 2018).

The original study's comparison with Nepal and Colorado (Renold et al., 2025, p. 22) suggests that this pattern is cross-cutting: employers everywhere struggle to find workers with strong soft skills, and they view the workplace as the optimal learning environment. This has important implications for VET reform: it suggests that increasing work-based learning should be a central priority, not just for the hospitality sector but for VET more broadly.

However, the study also reveals that providers are reluctant to increase work-based learning because they lack the capacity and support structures to manage it effectively. This highlights the need for investment not only in program design but also in the institutional infrastructure that enables high-quality workplace learning: training for in-company trainers, quality assurance mechanisms, and coordination platforms that match students with employers.

IMPLICATIONS FOR POLICY AND RESEARCH

The critical reflections above have important implications for both policy and research. This section outlines key areas for reconsideration and future inquiry.

Policy Implications

First, prioritize institutional capacity-building over institutional restructuring. While the recommendation to establish Universities of Applied Sciences has merit, it should not overshadow the more fundamental task of building the capacity of existing institutions—particularly VET colleges and Monocenters—to deliver high-quality, industry-relevant training. This includes investing in teacher and trainer professional development, curriculum modernization, and infrastructure.

Second, invest in collective employer organization. Without strong employer associations that can aggregate interests, develop standards, and coordinate training, dual education will remain a patchwork of bilateral arrangements. Policy should support the development of sectoral associations, including through legal frameworks that define their role in VET governance and provide sustainable funding.

Third, create enabling conditions for work-based learning. Providers' reluctance to increase workplace learning reflects legitimate concerns about quality, capacity, and coordination. Policy should address these concerns by establishing clear quality assurance frameworks for workplace learning, providing training and support for in-company trainers, and creating coordination platforms that reduce transaction costs.

Fourth, adopt a phased approach to dual education expansion. Rather than attempting to replicate Swiss or German models wholesale, Uzbekistan should adopt a phased approach that builds institutional capacity incrementally. This could begin with pilot programs in sectors with strong employer engagement, followed by systematic evaluation and scaling.

Fifth, align international benchmarking with local realities. International experience is valuable, but it should inform rather than dictate reform. The focus should be on underlying principles—social partnership, competency-based curricula, work-based learning—rather than specific institutional forms.

Research Agenda

First, political economy of VET reform. Future research should examine the interests, coalitions, and power dynamics shaping VET policy in Uzbekistan. Who are the key actors, what are their interests, and how do they influence reform outcomes? Such analysis could draw on political science frameworks (e.g., Hall & Soskice, 2001; Mahoney & Thelen, 2010) and comparative case study methods.

Second, institutional ethnography of education providers. Qualitative research is needed to understand the internal dynamics of Monocenters, VET colleges, and universities. How do institutional cultures, leadership, and resources shape engagement with employers? What are the day-to-day challenges of implementing work-based learning? Such research could employ ethnographic methods, including observation and in-depth interviews.

Third, longitudinal tracking of graduates. The cross-sectional design of the original study cannot assess whether training programs actually improve employment outcomes. Longitudinal research tracking graduates over time—their transitions to employment, career progression, and earnings—is essential for evaluating program effectiveness.

Fourth, comparative analysis of employer associations. Cross-country research on the development of employer associations in transitional economies could provide valuable insights for Uzbekistan. What conditions enable collective employer engagement? How can associations build capacity to represent employer interests effectively? Such research could draw on comparative case study methods and institutional analysis.

Fifth, digital transformation and skills. The original study's finding that digital skills are relatively abundant but not highly prioritized warrants further investigation. As the hospitality sector increasingly adopts digital technologies (e.g., online booking, contactless payments, AI-driven customer service), the demand for digital skills will grow. Research should explore how VET systems can respond to these changing demands.

CONCLUSION

Renold, Palayil, and Caves' (2025) study *Mapping the Education Landscape* is a significant contribution to the empirical literature on VET in Uzbekistan. Its systematic survey of education providers, innovative use of a discrete choice experiment, and comparative analysis with employer

demand provide an invaluable foundation for policy and further research. As such, it deserves a central place in ongoing efforts to reform vocational education in the country.

However, this review has argued that the study's findings require deeper critical engagement. The institutional fragmentation of Uzbekistan's VET landscape, the governance deficit in education-employment linkage, the paradox of provider preferences, and the tensions inherent in international benchmarking all point to the need for more theoretically informed analysis. By situating the study within broader debates on the political economy of skills formation, this reflection has sought to move beyond descriptive summary to interrogate the structural conditions that shape VET outcomes.

Ultimately, the challenge of building effective dual education systems is not merely one of designing programs that align with provider and employer preferences. It is about constructing the institutional infrastructure—strong employer associations, robust governance mechanisms, sustainable funding models, and cultures of cooperation—that enable collective investment in skills. The original study provides an essential empirical baseline; the task now is to build on its foundations, asking the harder questions about how to transform institutional fragmentation into systemic coherence, and how to move from bilateral cooperation to institutionalized social partnership.

As Uzbekistan continues its ambitious VET reform agenda, the insights from this study—and the critical reflections offered here—can help ensure that reforms are grounded in evidence, attentive to institutional realities, and oriented toward the ultimate goal: building a skilled, adaptable workforce capable of sustaining the country's economic transformation.

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