

Enterprise surveys as a tool for identification of skill needs

Information inputs by Member States
based on the template prepared by Cedefop

Table of content:

Introduction	3
Table 1. Template ‘Enterprise surveys as a tool for identification of skill needs’: comparison of answers from country experts	6
1. Belgium.....	7
2. Bulgaria.....	10
3. Czech Republic	13
4. England	16
5. Estonia	20
6. Finland	26
7. France	30
8. Germany	33
9. Greece	36
10. Ireland.....	42
11. Luxembourg.....	45
12. The Netherlands.....	48
13. Poland	54
14. Portugal.....	62
15. Romania.....	65
16. Slovakia	73
Annex: full template.....	76

Note: All supporting documents mentioned in the text under “Available documents” can be requested from Skillsnet team (skillsnet-team@cedefop.europa.eu).

Introduction

Olga Strietska-Ilina, Skillsnet

A new Skillsnet's ¹ initiative aims at finding a common European approach to enterprise surveys as a tool for identification of skill needs and skill gaps.

Main objectives of the initiative are:

- to map existing surveys at European level with the view of their potential usage for skill needs analysis,
- to compare and discuss questions used in the enterprise surveys in EU Member States (MS) with the view of their potential comparability and compatibility,
- to agree about future steps towards feasibility of a common approach to enterprise surveys to analyse skill needs at European cross-country level.

In the framework of this initiative MS' experts were invited to submit short information on national enterprise surveys based on a template prepared by Cedefop's Skillsnet team (see the full-text template in the Annex).

Skillsnet's coordination team received answers from sixteen MS to date: Belgium, Bulgaria, Czech Republic, Estonia, Finland, France, Germany, Greece, Ireland, Luxembourg, Netherlands, Poland, Portugal, Romania, Slovakia and England - the only part of the UK covered. These answers are summarised in Table I.

The comparison revealed that all 16 MS concerned conduct some kind of enterprise surveys relevant to a broader subject of identification of skill and training needs. The surveys however differ greatly in their objectives, regularity, sample sizes and in a range of questions covered in questionnaires.

Objectives of enterprise surveys can be divided into five broad categories:

- (a) design of policies in the field of initial and continuing education and training;
- (b) design of training programmes, vocational training standards;
- (c) identification of skill deficiencies according to level and type of education/training;
- (d) work organization, operating environment, business and technological changes and their impact on company's skill and training needs;
- (e) HRM/HRD and recruitment practices and problems, skill gaps and labour shortages.

¹ Skillsnet is an international network on early identification of skill needs (www.trainingvillage.gr/skillsnet) coordinated by Cedefop (www.cedefop.europa.eu)

In practice surveys pursue more than one objective and in many cases it is a combination of several of above mentioned objectives.

Eleven countries out of sixteen conduct surveys in specific sectors / industries / occupations or territories. Some surveys are particularly targeted at SMEs. At the same time Czech Republic, Estonia, Finland, France, Germany, Greece, Ireland, Portugal, Romania, Slovakia and England have conducted or conduct now some sort of a nation-wide survey.

Nine countries have regular enterprise surveys of varying periodicity (monthly, annual, biennial) and five more countries plan repeating existing surveys in future, subject to support, interest and funding. Altogether thirteen countries envisage continuing enterprise surveys in future.

Although methods and tools used for enterprise surveys differ across countries, a number of similarities were identified. All countries use structured questionnaires. Six conduct face-to-face interviews either with help of CAPI ² or not; others use a combination of on-line, postal, email and telephone interviewing techniques.

Response rate depends on the surveying method. Those using face-to-face interviewing enjoy around 80% response rate, postal, telephone and on-line interviewing brings between 20-50% of responses with the exception of France where telephone interviewing succeeds in gaining the 80% response rate.

A unit of analysis is an establishment (9 surveys) or an entire enterprise/organization (8 surveys), whereas in Greece and Romania different surveys apply both approaches. Respondents are mostly HR managers/officers, in smaller companies - owners, directors or top managers. Some MS complement surveys with focus groups or additional surveys among social partners and other stakeholders (e.g. regional/local representatives). Only six MS cover in the same survey or run a complementary survey among respondents-employees, of which four have results matched with responses by employers to make identification of skill gaps and training needs more robust.

The sample size largely depends on objectives pursued and level of detail needed but in general surveys seek to provide a good coverage of the segment under scrutiny (e.g. sector, profession, region etc.). Many MS survey a large number of enterprise (e.g. 27 thous in England, 16 thous in Germany, 15 thous in France) aiming at covering a large proportion of the labour force. Most MS use targeted or non-targeted sampling stratified / weighed by type and size of enterprise/organization/establishment (in terms of number of employees), sector and region.

In their analyses MS widely use international classifications, such as NACE, ISCO-88 and ISCED. Only three MS however use national classification systems either linked or not to the

² Computer-assisted personal interviewing

international ones. This, under certain conditions, provides good grounds for potential comparability.

Responsibility for surveys is mostly in hands of ministries and their research bodies but also it often belongs to private or public research institutions, consulting companies or universities. Funding mostly combines a number of resources: twelve countries enjoy funding from ministries and public employment services, four countries (Finland, Luxembourg, Poland and Romania) report (co-)funding from EU sources (ESF, Leonardo da Vinci, Eures, Phare, ETF), two countries (Finland and the Netherlands) had support from social partner organizations and/or their training funds, and finally in Germany there is also some Länder support.

No matter how different methods and objectives of enterprise surveys in individual MS, it is very optimistic that all countries expressed their willingness and preparedness to discuss and to look for possibilities to make their results comparable to other similar surveys in other countries. It is particularly important that even in countries with already long-established tradition of enterprise surveys there is readiness to make some sacrifices of comparability over time in order to achieve comparability over European space. It is therefore possible to conclude that the new initiative of Skillsnet aimed at finding a common European approach to enterprise surveys as a tool for identification of skill needs is timely and necessary.

Table 1. Template ‘Enterprise surveys as a tool for identification of skill needs’: comparison of answers from country experts

See here after.

1. Belgium

Rik Huys, HIVA - KULeuven

Monique Ramioul, HIVA - KULeuven

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

PASO (Panel Survey of Organisations).

2. *What are main objectives and key subject areas of the survey?*

Work organisation, personnel policy and management.

3. *How regular is the survey*

Yearly (2002, 2003, 2004).

4. *What is the unit of analysis?*

Establishment.

5. *What is the sample size?*

N = 2000 establishments (= net-response).

6. *How is the sample constructed?*

Whole economy, starting from organisations with one employee. Stratification according to economic activity (7 strata), size (5 strata) and region (5 strata).

7. *Which classifications are in use?*

NACE.

8. *What is the response rate (in %)?*

19%.

9. Who are the respondents?

(Personnel) manager.

10. How is the survey conducted?

Websurvey (and postal for small organisations).

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.

Yes, structured questionnaire. Next to a similar core part, there are also variable modules in the questionnaire according to the year it is varied out. Content of a specific year:

- characteristics of establishment,
- products / services,
- organisation of human resource management,
- employment,
- flexibility,
- personnel planning, recruitment and selection,
- turnover,
- appraisal,
- training,
- career planning,
- pay,
- competence management,
- division of tasks in personnel policy,
- employee participation,
- social dialogue,

12. Which institution funds the survey?

Ministry of the Flemish Community, Administration employment.

13. Which institution is responsible for the survey?

Catholic University of Leuven (K.U.Leuven); Higher Institute for Labour studies (HIVA); IDEA Consult; University of Antwerp Management School (UAMS).

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

No, currently discontinued.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Yes.

16. Are the results of the survey published?

Downloadable publications from : <http://econ.kuleuven.be/projects/paso/publicaties.htm>.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

No.

Available documents:

- (a) Questionnaire of a single year (in Dutch).
- (b) Comparison of PASO-methodology with organisation surveys in other European countries (in English)³.

³ Can not be copied without permission as the article is currently being published.

2. Bulgaria

Vanya Tividosheva, HRDC

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

There is still not regular system for an enterprise survey on skill needs and skill gaps. However, the recent analysis on enterprises, skill needs included, is available in the Operational Programme Competitiveness (introduction analytical pages) and in the Report on SMEs prepared by “Vitosha research” in August 2006 as delegated task by Ministry of Economy.

2. *What are main objectives and key subject areas of the survey?*

In the documents mentioned above there is no particular emphasis on training measures since the purposes are different. There are some clarifications in terms of training needs, namely : IT and entrepreneurship.

3. *How regular is the survey?*

There are not regular surveys but such developments will be encouraged through priorities and operations within Operational Programme Competitiveness and Operational Programme Human Resource Development both covering the programme period 2007-2013 for the implementation of ESF. The existing in the past surveys are mainly sporadic and project based reports, usually as a component within the overall project.

4. *What is the unit of analysis?*

There are Different institutions that have such establishments:

- National Agency for Promotion of SMEs
- Bulgarian Chamber of Commerce and Industry
- Bulgarian Industrial Association
- Bulgarian Association of Human Resource Managers
- National Employment Agency.

5. *What is the sample size?*

No answer.

6. *How is the sample constructed?*

Regarding the last survey prepared by Vitosha Research (a company for sociological surveys) as well an analysis done in the OP Competitiveness cover all listed above types of enterprises but it is not clear targeted to the training needs and gaps.

7. *Which classifications are in use?*

ISCED levels.

8. *What is the response rate (in %)?*

N/A.

9. *Who are the respondents?*

Managers, Directors and Owners of SMEs, representatives of employers associations, representatives of bank sector (page 5 of Report on SMEs, August 2006, Vitosha Research).

10. *How is the survey conducted?*

Questionnaires, discussions in focus groups, desk research.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

The general content is announced in the survey and it concerns the level of readiness of SMEs for absorption of ESF

12. *Which institution funds the survey?*

Ministry of Economy financed the survey mentioned above.

13. Which institution is responsible for the survey?

Vitosha research.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

N/A.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Yes.

16. Are the results of the survey published?

Yes, in the webpage of Ministry of Economy, Directorate for EU projects and Programmes: www.iaphare.org. The document is downloaded and enclosed to this questionnaire.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

Available documents:

(a) Bulgarian SME report (in English).

3. Czech Republic

Vera Havlickova, National Training Fund

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

Enterprise survey in the North Bohemia region (2001).

Employers survey in the district of Chomutov (2005).

Survey on education and training needs in the region of Karlovy Vary (2005).

Innovation enterprises and their HRD policies (2006).

Analysis of business / corporate environment.

Employers' needs and readiness of graduates for entry to the labour market (2000, 2004).

Survey on labour market needs in the South Bohemia region (2002, 2003, 2005).

Enterprise survey on human resource development issues (2003). The following information relates to this survey.

2. *What are main objectives and key subject areas of the survey?*

The aim of the survey was to analyse reasons for different enterprise approaches to training and human resource development issues and to identify main barriers. A part of the survey consisted of an evaluation of the applied human resource development measures by respondents. The results of the survey were analysed in detail (the study is available on-line in Czech only).

3. *How regular is the survey?*

It was one-off survey (field work in autumn 2002, results available 2/2003).

4. *What is the unit of analysis?*

An establishment.

5. *What is the sample size?*

The sample included 1500 establishments but in only 901 the survey was realised (760 SMEs and 141 large companies).

6. *How is the sample constructed?*

Stratified sample (see below).

7. *Which classifications are in use?*

The following classification were used: ISCO, ISCED and classification compatible with NACE.

8. *What is the response rate (in %)?*

60%.

9. *Who are the respondents?*

Respondents were people responsible for training and recruitment in companies with more than 5 employees.

10. *How is the survey conducted?*

CAPI.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

The questionnaire has 5 thematic areas:

- human resource management and development,
- labour turnover and recruitment,
- issues related to the accession to the EU,
- relations outside the enterprise
- background questions.

12. Which institution funds the survey?

NTF – NOET – via grant received from the Ministry of Employment and Social A.

13. Which institution is responsible for the survey?

NTF - NOET.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

Yes, however, modified and only if any financial resources would be available.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Yes.

16. Are the results of the survey published?

Results are available (in Czech language only) at:

http://www.nvf.cz/publikace/pdf_publikace/observator/cz/rlz_smes.pdf.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

No.

4. England

Tracy Mitchell, National Employer Skills Survey

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

National Employer Satisfaction Survey.

2. *What are main objectives and key subject areas of the survey?*

To provide the LSC and its partners with robust and reliable information from employers in England on skills deficiencies and workforce development to serve as a common basis to develop policy and assess the impact of skills initiatives. The survey includes five main sections:

- Recruitment problems
- Skills Gaps
- The recruitment of 16-24 yrs direct to employment
- Training and Workforce development
- Training expenditure.

3. *How regular is the survey?*

Biennially, as of 2005

- ESS1999 – 27,000 establishments: 4,000 face-to-face. Survey was designed excluded those establishments with fewer than five employees and those in the agriculture sector;
- ESS2001 – similar to ESS1999 in sample size but extended the sample design to cover all establishments with more than one employee;
- NESS03 – 72,000 establishments. The sample coverage was comparable to 2001, in that all establishments were eligible for interview;
- NESS04 – 27,000 – unlike previous surveys the survey was employment rather than employee based with all establishments with two or more staff being eligible for interview;
- NESS05 – at 74,835 this was the largest survey in the series, with an identical sample design to NESS04 (changes to the questionnaire were introduced during

2005, although the majority of the questionnaire drew heavily on the NESS03 and 04 questionnaires, to maximise comparability);

- NESS07 – is currently in field the sample will be in the region of 75,000 and will be with establishments with two or more staff.

4. *What is the unit of analysis?*

Establishment.

5. *What is the sample size?*

2005 - 74,835

2004 – 27,000

2003 – 72,000

2001 – 27,000

1999 – 27,000.

6. *How is the sample constructed?*

The sample design for 2005, was created using a three-dimensional grid defined by sector of business activity and size of establishment within local Learning and Skills Council (local LSC) area.

The target number interviews was distributed between each local LSC in proportion to the number of establishments within that locality, though in smaller local LSCs the number was boosted to ensure a minimum of 1,000 interviews.

For the current 2007 study the approach will be regional focused with half of the interviews split evenly by region, and the remaining half split in proportion to the number of establishments in each region.

7. *Which classifications are in use?*

Industry coding: Allocating each establishment to sector was done using the four and sometimes five-digit Standard Industrial Classification (SIC) supplied for each record.

8. *What is the response rate (in %)?*

43% for 2005 (42% 2003 / NESS04 33%).

9. Who are the respondents?

Employers within establishments with at least two people. The most senior person at the site with responsibility for human resource and personnel issues.

10. How is the survey conducted?

CATI.

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.

Yes

- Recruitment problems
- Skills Gaps
- The recruitment of 16-24 yrs direct to employment
- Training and Workforce development
- Training expenditure.

There is also a separate Wave that has been undertaken following on from NESS05 and NESS07 (questionnaire attached at Annex I – 2007 questionnaire not yet finalised), which looks at the cost of training.

12. Which institution funds the survey?

LSC with contributions from the DfES and SSDA.

13. Which institution is responsible for the survey?

LSC.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

Yes – biennially.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Yes – We would be very interest in looking at how comparable we could make surveys. Obviously we will need to give great thought to losing some of the longitudinal data we have, but in principle we would be interested.

16. Are the results of the survey published?

Yes, <http://research.lsc.gov.uk/LSC+Research/published/ness/ness2005.htm>.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

There are some surveys completed among employees but none are merged with the National Employers Skills Survey

Available documents:

(a) NESS 2005 Questionnaire

5. Estonia

Janno Järve, Estonian Centre for Applied Research

1. Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?

The landscape of Estonian enterprise surveys is rather colourful. On one hand, Ministry of Economic Affairs and Communications is responsible for conducting yearly forecast of labour market needs. During this process the analysts of each sector consult their analysis also with employers' organizations. However, as this is done on yearly bases, the scope of this survey is not very in-depth. That is why yearly forecast is supported by more thorough sector studies.

We have also tried to estimate regional labour market needs. Estonia, with its 1,35 mil people and 45 000 square kilometres resembles a region in a larger country. Despite that, we do have 15 counties that are usually regrouped into 5 regions. The method, however, is similar to method used in sector surveys and I will not describe it here – following text concentrates mainly on yearly forecast and sector studies:

- Forecast of labour market needs;
- Sector studies.

2. What are main objectives and key subject areas of the survey?

- Forecast of labour market needs – the main goal of the forecast of labour market needs is to provide input for planning state commissioned education as well as to provide basic input for career counselling system. Consultation with employers' organizations is concentrated on identification of labour shortages by economic sector and occupation level.
- Sector studies – the aim of sector studies is following:
 - (a) Map the present situation and development perspective of the sector;
 - (b) Identify the main factors influencing the development of the sector;
 - (c) Map the labour that is currently employed in the sector (the first attempt to test skills gap was done during the food industry sector study);
 - (d) Estimate the labour and training needs of the sector;
 - (e) Make recommendations for improving the competitiveness of the sector and design the implementation plan;
 - (f) Compose a database of enterprises that participated in the survey.

3. *How regular is the survey?*

- Forecast of labour market needs – the consultation is conducted on yearly basis (during summer) for 6 coming years. The forecast is completed in September.
- Sector studies – until now the sector studies have been irregular (wood and furniture manufacturing in 1999, metal, electronics and apparatus industry 2001, Information and telecommunication industry 2003, food industry 2003).

4. *What is the unit of analysis?*

- Forecast of labour market needs – employers' organization.
- Sector studies – enterprise level (enterprises in the sector as well as several contractors), entrepreneurs' organizations, trainers (vocational education schools, universities). The questionnaire in the Annex I is a universal questionnaire that was customized to each target group.

5. *What is the sample size?*

- Forecast of labour market needs – main representative of the employers of the specific sector.
- Sector studies: The main principles for constructing a sample were the same for all surveys. According to the business register, there were 600 companies in food processing industry in 2003. The sample included 193 enterprises..

6. *How is the sample constructed?*

- Forecast of labour market needs – The consultation is carried out with main representative of employers' interests in specific sector.
- Sector studies: Again I will bring the example of food processing industry:

The companies with less than 5 workers were excluded from the sample. All enterprises with more than 20 workers were included in the sample (156 companies). From the companies with 5-19 workers (all together 140 companies) 38 companies was included. The companies were selected in the way that the distribution of workers between the sub-sectors in the sample was corresponding to the sub-sectoral distribution of workers in the population.

Out of these, 25 companies was chosen for in-depth interviews (finally 18 was concluded). In addition 11 in-depth interviews were conducted with employers unions (5 interviews), representatives of vocational training providers (4), retail chain representatives (2). As a result of these interviews the method for quantitative survey was developed. Also, this information was later on helpful for interpreting the results of

quantitative survey. All together in-depth surveys ended with 18 successful contacts. The Annex includes the questionnaire for in-depth interviews.

All 194 companies were selected for conducting quantitative survey in form of interviews or the companies were asked to fill in a questionnaire (listed in the Annex I). The quantitative survey ended with 130 successful contacts.

As the final step focus groups were conducted (see Annex I). The main purpose of the focus groups was also to discuss the interpretation on quantitative survey..

7. Which classifications are in use?

- Forecast of labour market needs – NACE, ISCO (group level, slightly modified – groups 8, 7 and 6 are aggregates as well as groups 3 and 2).
- Sector studies – NACE, ISCO, ISCED.

8. What is the response rate (in %)?

- Forecast of labour market needs – all employers' organizations that are consulted do provide their input.
- Sector studies – for telephone surveys ca 70%.

9. Who are the respondents?

- Forecast of labour market needs – the management of the employers' organization.
- Sector studies – manager of the enterprise, head of employers' organization, heads of training providers).

10. How is the survey conducted?

- Forecast of labour market needs – telephone interview.
- Sector studies – face-to-face interviews with the managers (in some cases personnel managers were involved as well) of the enterprise, with employers' organizations, training institutions and contractors, also in-depth interviews and focus groups were used. The process is already described under the question six.

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.

- Forecast of labour market needs – the consultation goes as follows. First the entrepreneurs' organizations are presented with draft analysis that they can comment. They are asked to give their opinion on the:
 - (a) Present economic situation
 - (b) Key factors of competitiveness
 - (c) Forecast of number of people employed in the sector 6 years from now
 - (d) Forecast of change in occupation structure in 6 years from now (ISCO classification).
- Sector studies – the structure of the questionnaires is listed in the Annex I
 - (a) General information (turnover, production, investments)
 - (b) Employees, key occupations
 - (c) Hiring policy
 - (d) Awareness about VET institutions and graduates
 - (e) Vocational standards
 - (f) Continuing education for employees.

12. Which institution funds the survey?

- Forecast of labour market needs – survey is financed by Ministry of Economic Affairs and Communications, survey carried out by the officials of the ministry.
- Sector studies – the three surveys listed above have been financed by INNOVE - Foundation for Lifelong Learning Development under Ministry of Education and Research, Ministry of Social Affairs..

13. Which institution is responsible for the survey?

- Forecast of labour market needs – Ministry of Economic Affairs and Communications.
- Sector studies – Ministry of Education and Research, however, it is not very clearly stated responsibility at the moment..

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

- Forecast of labour market needs – the survey will be conducted annually also in the future.
- Sector studies – There is no agreement on schedule, however, it is very likely that the studies will be conducted also in the future..

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

First and foremost, it is important to establish a system inside Estonia – the system for forecasting labour market needs is today incomplete and different parts of the system (e.g. in-depth studies and yearly forecast) do not match as well as they should.

However, in certain sectors it would be interesting to have international comparison of labour market needs. For example – Estonia is having labour shortages in health care sector and this is to some extent result of intensive hiring practices of Nordic countries. There have been discussions about composing a pan-European plan for commissioning education for health sector. Internationally comparable analysis of labour market needs could serve as an input for this..

16. Are the results of the survey published?

All following papers are, unfortunately, in Estonian:

- Latest version of Forecast of labour market needs can be found under the following link: <http://www.mkm.ee/doc.php?10222>.
- Sector studies:
 - (a) Wood and furniture industry (<http://www.innove.ee/ee/files/PMS1.pdf>);
 - (b) Metal, electronics and apparatus industry (http://www.innove.ee/ee/files/Metalli_Sektoruuring1.pdf);
 - (c) Information and telecommunication industry (<http://www.innove.ee/ee/files/Metalli%20Sektoruuring.pdf>);
 - (d) Food processing industry [http://www.sm.ee/est/HtmlPages/ToojõuAruanne/\\$file/TõõjõuAruanne.pdf](http://www.sm.ee/est/HtmlPages/ToojõuAruanne/$file/TõõjõuAruanne.pdf).

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

We do not have linked employer employee data for identifying labour market needs. The only survey used in labour market forecasts is the Labour Force Survey conducted by Estonian Statistical Office.

Additional information on studies concerned with identifying labour market needs

Planning of education for training specialists with vocational education, professional higher education and academic education in following fields of training:

- Mechanics and metal works;

- Electrical engineering and energy;
- Electronics and automatics;
- Construction and civil engineering.

(<http://www.hm.ee/index.php?popup=download&id=3950>). It is not a survey. However, this study is particularly interesting because it is the first attempt to link specific fields of training directly with the forecast of labour market needs. The structure of the analysis is following:

- General overview of economic sectors;
- Labour supply, fields of training and the position of graduates in the labour market;
- The position of graduates in the labour market – analysis of distribution indexes;
- Forecast of labour market needs.

The competitiveness of Estonian manufacturing on European Union – Wood Cluster (http://www.riigikantselei.ee/failid/5_uurimus.zip). The analysis is mainly concerned with competitiveness issues among them also with labour demand. However, the labour market needs are not dealt very thoroughly.

Available documents:

- (a) The questionnaires from the last – food processing industry – analysis (in Estonian).

6. Finland

Kyrö Matti, Finnish National Board of Education

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

The employment and economic development centres (15 regional centres in the country altogether) have as their responsibility to make analysis on the development of the labour market and labour force in their areas. They have the Research Model for Employment and Education Needs Survey (TKTT Työvoima- ja koulutustarvetiedustelu). All the country's Employment and Economic Development Centres make use of the Research Model for Employment and Education Needs and expert panel work in their foresight activities, in order to survey business enterprises' short-term needs (½–2 years). In addition to employment and education needs and recruitment problems, these interviews provide information on changes in content areas and skills needs in key occupations within specific businesses and industries, as well as their age structures, enterprises' networking needs, outsourcing plans, their economic, investment and export outlook, spatial needs and R&D activities. Once the interviews have been conducted, the results are submitted for analysis and interpretation by expert panels, which consist of representatives invited from businesses, educational institutions, municipal development centres/companies, local employment offices and the regional T&E Centre. The panel prepares a SWOT analysis and makes concrete proposals for action with a view to solving any problems detected. The TKTT database has been integrated as part of the T&E Centres' customer relationship management system (ASKO).

The Confederation of Finnish Industries, EK makes a regular survey for the member enterprises of the confederation called labour force survey. The survey is done once a year. Another survey made by the Confederation is the education and recruiting questionnaire to 2000 member enterprises. One of the aims of this survey is to influence on the development of the education policy in the country.

Employer organisations in some branches (for instance Technology industries, Energy industries) make their own anticipations of the skills and education needs on the branch.

Irregular surveys are made by different kind of organisations aiming to have information on the skills in one specific branch.

The Project to Anticipate the Quantitative Educational Needs in Vocational Education and Training was implemented by the National Board of Education with support from the Ministry of Education and the European Social Fund. The objective was to acquire the statistical and other information necessary for anticipation and to create a calculation model that could be applied to anticipation, which would utilise this material. On the

basis of the results, a national forecast of educational needs was produced, stemming from the needs of working life.

With the aid of the calculation model, forecasts of needs for vocational education and training for 2001-2005 were derived from the forecasts of changes and natural wastage in the total labour force, extending to the year 2010. These forecasts were then presented for different fields of study and levels of education in qualification-oriented initial vocational education and in higher (polytechnic and university) education.

Abridged English version of an anticipation publication entitled Vocational education and training 2010, Demand for new labour in 2010 and the dimensioning of vocational education and training.

2. *What are main objectives and key subject areas of the survey?*

See the answer to question 1. Generally one can say that surveys mentioned above have as the main objective to identify the skill shortages and needs of training.

3. *How regular is the survey?*

The Employment and Education Needs Survey, the labour force survey are annual surveys. The long-term anticipations are made as one-time surveys.

4. *What is the unit of analysis?*

The unit of the analysis is one enterprise/organisation.

5. *What is the sample size?*

The questionnaires are normally sent to all enterprises but the proportion of the answers varies.

6. *How is the sample constructed?*

No answer.

7. *Which classifications are in use?*

ISCO and in some cases ISCED, but normally education classification is the national one.

8. *What is the response rate (in %)?*

No answer.

9. *Who are the respondents?*

No answer.

10. *How is the survey conducted?*

No answer.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

Yes, structured questionnaires are normally used.

12. *Which institution funds the survey?*

The surveys are funded by the institutions themselves and in most cases co-financed by ESF.

13. *Which institution is responsible for the survey?*

See the answer 1.

14. *Is there a plan to continue the survey in future? If yes, specify when and how often.*

The annual surveys are planned to continue regularly.

15. *Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?*

No answer.

16. *Are the results of the survey published?*

All the surveys are published as paper versions and web-versions.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

No.

(b) The questionnaires from the last – food processing industry – analysis (in Estonian).

7. France

Jean-Louis Zanda, Agence Nationale Pour l'Emploi

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

Panel 'Anticipations des entreprises'.

2. *What are main objectives and key subject areas of the survey?*

Describe the evolution of the labour market, measure recruitment difficulties, joining specific categories of establishments (for ex. Those recruiting by Internet).

3. *How regular is the survey?*

Yearly since 1999. Changes in methodology do not allow to make comparisons over time in many cases.

4. *What is the unit of analysis?*

Establishment (of 1 salaried person and above).

5. *What is the sample size?*

N = 15,000 establishments (responding).

6. *How is the sample constructed?*

Stratification by size, industry, region.

7. *Which classifications are in use?*

NACE, with aggregated or more detailed categories.

8. *What is the response rate (in %)?*

Around 80 % for effective contacts.

9. *Who are the respondents?*

Mainly directors, managers, or human resources staff.

10. *How is the survey conducted?*

Telephone questionnaire (CATI).

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

Activity, foreseen investments, present situation of staff, hirings (past and foreseen), recruitment difficulties.

12. *Which institution funds the survey?*

ANPE (Agence Nationale Pour l'Emploi : Public Employment Service).

13. *Which institution is responsible for the survey?*

ANPE.

14. *Is there a plan to continue the survey in future? If yes, specify when and how often.*

Future is uncertain due to important changes that should have important effects on the organization as such.

15. *Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?*

Yes.

16. *Are the results of the survey published?*

Yes, provided. The publication is sent to employers who have answered.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

No.

8. Germany

Lutz Bellmann, IAB

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

IAB-Establishment Panel.

2. *What are main objectives and key subject areas of the survey?*

The IAB-Establishment Panel is multi-theme survey which contains questions about the development of the employment, vocational and further training and its determinants. On 24 pages there are questions concerning employment structure, skill needs, investments, organisational change, works councils, public subsidies, contact with the labour office, e.g.

3. *How regular is the survey?*

The IAB-Establishment Panel is conducted every year since 1993. The number of establishments interviewed has increased from approx. 4,300 to 16,000. We use a modular system: the questionnaire contains regular items, especially about the employment and vocational training, which are asked each year, items which are asked every two or three years, especially about further training, and some questions of recent importance (e.g. elder employees, skill needs).

4. *What is the unit of analysis?*

The unit of analysis is the establishment, of which 85% are independent firms.

5. *What is the sample size?*

The sample size increased from approx. 4,300 to 16,000 interviewed establishments. Our population consist of 2,000,000 establishments. The proportion of the workforce of the interviewed establishments is above 10%.

6. *How is the sample constructed?*

The IAB-Establishment Panel contains establishments of all types, sizes, sectors and regions. It is constructed according to the principle of optimal stratification, i.e. larger units have much higher selection probabilities.

7. *Which classifications are in use?*

For the classification of the sectors the NACE classification is used.

8. *What is the response rate (in %)?*

We achieve a response rate above 80% for the repeatedly asked establishments. For the newly asked establishments the response rate is above 50%.

9. *Who are the respondents?*

We try to reach the highest ranking person possible. In practice the questionnaire is filled out by the head of the human resource department in larger companies.

10. *How is the survey conducted?*

The field work is organised by TNS-Infratest Sozialforschung. Most of the interviews are conducted by personal interviews.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

see Annex II.

12. *Which institution funds the survey?*

More than 50% is funded by the IAB. Almost every state of the Federal Republic of Germany and the Institute for Economic Research Halle funds the remaining costs.

13. *Which institution is responsible for the survey?*

The IAB department “firms and employment”.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

The intention is to continue the survey at least for the next years and to organise it as a permanent survey.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

The IAB is very much interested to compare the results for core indicators of other countries to assess the importance of the institutional background.

16. Are the results of the survey published?

In the years 2004-2006 almost 250 publications are produced on the basis of the IAB-Establishment Panel. Many of them can be downloaded from the IAB web-site.

<http://iab.de/iab/publikationen/publikationen.htm> .

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

Since the employment statistics of the federal employment service provides the sampling frame of the IAB-Establishment Panel it is possible to link the establishment data with the employee data. There are yet a number of publications on this topic available.

Available documents:

- (a) Employment trends – employment pool 2002.
- (b) Employment trends – employer survey 2005 (in English).
- (c) Employment trends – employer survey 2005 (in German)
- (d) The IAB-Establishment Panel ‘employment trends’.

9. Greece

Olimpia Kaminioti (OK), Employment Observatory

Elias Kikilias (EK), National Centre for Social Research

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

OK: Business skill survey (**BSS**).

EK: The main regular survey in Greece is the “Survey on Vacancies” conducted by the National Statistical Agency of Greece.

There are also available:

- 1 survey conducted by the Ministry of Labour in 2001.
- 2 surveys conducted by the Federation of Greek Industries, in 2001 and 2004, which are expected to be continued.
- Minor studies financed by EU programmes, as is EQUAL, LEONARDO etc., that are not usually accessible.

All the above surveys are based on the concept of “occupation”, while the concept of “skill” is rather minimal, if it exists at all.

At this point of time there is underway a skill-focused survey financed by a consortium of the major non-profit foundations of Greece on the “Employability of the Higher Education Graduates (**EHEG**) in Greece” Phase A, that is almost completed, included field research of employers and matched employees aiming at the identification of employability skills’ gaps.

2. *What are main objectives and key subject areas of the survey?*

OK/BSS: The main objective of the survey is to collect information on the occupational, educational and geographical structure of employment in private businesses of all types and employment sizes at the local level and the identification of skill needs in these businesses.

EK/EHEG: The main objective of the survey is the identification of employability skills’ gaps. The main methodological innovation of this project concerns the application of a rather extensive set of skills and abilities (based mostly on the O*NET groupings) and personality characteristics seeking to identify both the level and the nature of gaps and

shortages. Specifically, both employers and employees were asked to assess the level of various employability skills required for the job and the level that universities provided for these skills. At the same time, the questionnaires included a number of relevant questions for the enterprises and the employees, concerning e.g. the issue of under-utilization of employees, the nature of hard-to-fill vacancies, the fields of study of employees, the relevance of the current job to the field of study, the difficulty to find a job, etc. As far as I know this is the first study in Greece, aiming at the identification of employability skills' needs and shortages, since the usual - and very few - studies are based on the not-very-informative and possibly quite misleading concept of "occupation". It is also among the few studies in Europe focused rather on skills than on other concepts, and certainly among the very few employing a quite extensive set of employability skills. The project is financed by a consortium of the major non-profit foundations of Greece (including Bodosakis foundation, Lambrakis foundation, Onassis foundation, Niarchos foundation).

3. *How regular is the survey?*

OK/BSS: The first survey was done in the second semester of 2003 and covered all Greece. The second one is currently under way and covers the area of Attica (about half of Greece). The next survey is planned for 2008. The third one will cover all Greece.

EK/EHEG: The survey was conducted during the last months of 2006 and this was the first attempt to explore employability skills' gaps and shortages in Greece.

4. *What is the unit of analysis?*

OK/BSS: The unit of analysis is the local establishment.

EK/EHEG: The unit of analysis was (a) the enterprises of the private sector and (b) matched employees of the enterprises.

5. *What is the sample size?*

OK/BSS: In the first survey, 7,336 questionnaires were collected. This yields reliable data at most of the 52 local regions of Greece (all but four). The current survey will collect data from 1,200 businesses.

EK/EHEG: The sample size was 202 enterprises, with total employment of 28,790 persons, and 502 employees with tertiary education qualifications. There were two types of questionnaires used: (a) the first type (1 questionnaire per enterprise) was to be completed by the manager or the HR officer. (b) The second type (5 questionnaires per

enterprise) was to be completed by higher education graduates employees of the enterprise.

6. *How is the sample constructed?*

OK/BSS: The sample is constructed using three criteria: sector, employment size and geographical identification. Then the sample is enlarged in certain categories (sectors, geographical areas and employment sizes – mostly large businesses) and at the same time less businesses are included from sectors, areas and employment sizes that have a large number of businesses. Special weights are used in order to be able to analyse the data by sectors, employment sizes, etc and at the level of the country as well.

EK/EHEG: The sample was constructed by the Foundation of Economic and Industrial Research (IOBE), an independent research institution with a large experience in enterprise surveys. The “population” of enterprises was restricted to the private sector of the economy. Very small enterprises and the self-employed were also excluded. Regional coverage was, understandably, confined to the large cities of Greece. In terms of industry sectors, the sample was constructed according to sectoral GDP quotas.

7. *Which classifications are in use?*

OK/BSS: We use NACE, ISCO and ISCED.

EK/EHEG: The NACE classification has been used for industrial sectors. As far as the “skills” are concerned, we did not use the ISCO classification since the objective of the survey was the identification of skills shortages. Instead, the following classifications were used:

- A classification of the separate departments / divisions of the enterprise activity (9 divisions: Administration, Marketing and Sales, Client Services, Logistics, Financial, IT, Human Resources, Production, R&D).
- The ISCED classification for the graduates fields of study (18 fields).
- A rather analytical classification of general knowledge, skills, abilities and personality characteristics. There were used 10 main categories including 57 separate “elements” The main categories included:
 - (a) General knowledge, including 5 minor elements (foreign languages, office software, etc.)
 - (b) 7 categories of skills and abilities, based on the Functional Job Analysis theory and the O*NET groupings, including Basic Skills (5 elements), Process Skills (4 elements), Social Skills (6 elements), Complex Problem

Solving Skills (8 elements), Technical Skills (12 elements), Systems Skills (6 elements) and Resource Management Skills (4 elements)

- (c) Vocational experience, and
- (d) Personality characteristics and traits, including 5 minor elements.

8. *What is the response rate (in %)?*

OK/BSS: In the first survey, 81% of the questionnaires were in the original sample. When replacements were used, in 68% of the cases, the first replacement was used.

EK/EHEG: The targeted size of the sample was 200 enterprises and 500 employees. IOBE sent 2,000 questionnaires to be filled by enterprises and 5 questionnaires to each enterprise to be filled by employees, that is 10,000 questionnaires. The planned target turned out well and the response rate was consequently 10% for enterprises and 5% for their employees.

9. *Who are the respondents?*

OK/BSS: In small businesses, the owner or the person 'responsible' for the business. In large businesses the general manager or the human resource manager or another manager.

EK/EHEG: The first type of questionnaire (enterprise) was completed by the manager or the HR officer. The second type (questionnaire to matched employees) was completed by higher education graduates employees of the enterprise.

10. *How is the survey conducted?*

OK/BSS: Face to face interviews.

EK/EHEG: Questionnaires were sent and received by post and email.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

OK/BSS: Structured questionnaire. It includes questions about the characteristics of the business, the current employment structure, the expected employment structure in 3 years, vacancies and skill needs.

EK/EHEG: Structured questionnaires were used.

- The questionnaire for enterprises included thematic fields on general and structural characteristics of the enterprise, the utilization of higher education human resources, the under- utilization of graduates and the over- utilization of the lower educational level workforce, the criteria applied when filling vacancies, the importance of the abovementioned skills, abilities etc., the prospects for employment, the reasons for the hard-to-fill vacancies, the skills and abilities possessed by newcomers, the training activities, etc.
- The questionnaire for employees included thematic fields on the educational profile of the individual and its “trajectory” in the labour market, the relevance of the first and the current job both to the field of study and the skills and abilities of the individual, the level and the reasons of the difficulty to find a relevant job, the quality of current job (level of satisfaction in relation to wage, benefits, working conditions etc.), the “usefulness” of the studies to the current job tasks, the level of skills and abilities required to respond to current tasks and the level and types of skills that the individual was provided for by the higher education studies, etc..

12. Which institution funds the survey?

OK/BSS: The employment observatory is funding the survey with money from the Ministry of Employment (mostly EU funds).

EK/EHEG: The project is part of a broader “Educational and Developmental Initiative” financed by a consortium of the major non-profit foundations of Greece, including the Bodosakis Foundation, the Lambrakis foundation, the Onassis foundation, the Niarchos foundation, the National Bank Educational Foundation, the Eygenidis Foundation, the Kostopoulos Foundation and the Leventis Foundation.

13. Which institution is responsible for the survey?

OK/BSS: Employment Observatory, Athens, Greece.

EK/EHEG: The abovementioned Initiative has been managed by a Managerial Committee. The Foundation of Economic and Industrial Research (IOBE), an independent research institution with a large experience in enterprise surveys, had the responsibility to conduct the survey, in collaboration to an external expert (Dr. Elias Kikilias). There is also a broader evaluation committee for the Initiative as a whole, including two university professors for this specific project.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

OK/BSS: There is a plan to continue in regular intervals but decisions are pending.

EK/EHEG: Yes, but not in the immediate future.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

OK/BSS: Yes.

EK/EHEG: Yes.

16. Are the results of the survey published?

OK/BSS: Several publications have been produced using the data of the first survey which are in Greek and have been in the site of the observatory (www.paep.org.gr).

EK/EHEG: The first draft of the report is presently under formation. I do not know if the final report will be published, but I am planning to ask for the permission to use the results for “scientific” purposes (papers to journals, working papers, etc). When the report is concluded I shall ask the Managerial Committee the permission to send you a copy.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

Yes, matched.

Available documents:

(a) BSS: Questionnaire on determination of needs on labour market (in Greek).

10. Ireland

John McGarh, FAS

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

Ireland conducts a monthly representative survey of enterprises which confines itself to identifying the 5 most difficult to fill vacancies.

2. *What are main objectives and key subject areas of the survey?*

The extent of difficult to fill vacancies in each of 4 main sectors (manufacturing, construction, retail and other services) and employment forecasts at the level of the firm.

3. *How regular is the survey?*

The surveys are conducted monthly since 2002 and are comparable over time.

4. *What is the unit of analysis?*

It is a sample survey of establishments.

5. *What is the sample size?*

The sample is comprised of about 1,000 companies from an employee enterprise workforce of about 1.2 million is approximately .1%).

6. *How is the sample constructed?*

Stratified to reflect the sectoral structure of the workforce.

7. *Which classifications are in use?*

None; the employer describes the job-titles of the vacancies which are difficult to fill and we in the research unit code them to SOC occupational codes.

8. *What is the response rate (in %)?*

Around 80%.

9. *Who are the respondents?*

Employers of the companies contacted.

10. *How is the survey conducted?*

Postal questionnaire.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

Yes.

12. *Which institution funds the survey?*

FAS.

13. *Which institution is responsible for the survey?*

Economic and Social Research Institute.

14. *Is there a plan to continue the survey in future? If yes, specify when and how often.*

Yes, monthly.

15. *Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?*

Yes.

16. *Are the results of the survey published?*

Press release is issued and summary are published on the ESRI Website.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

No.

11. Luxembourg

Arthur Tibesar, ADEM

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

Les qualifications de demain dans l'industrie. 2. Les qualifications de demain dans le domaine des technologies de l'information et de la communication. See : <http://www.fedil.lu/Publications/>.

2. *What are main objectives and key subject areas of the survey?*

Identification of labour shortages and skill gaps – Training needs.

3. *How regular is the survey?*

Each year since 1997.

4. *What is the unit of analysis?*

Establishment.

5. *What is the sample size?*

All members of employers association FEDIL. Workforce covered $\pm$ 50 000 (more than 50 % of the population).

6. *How is the sample constructed?*

Target : members of FEDIL.

7. *Which classifications are in use?*

NACE (sectors) – ISCO (adapted).

8. *What is the response rate (in %)?*

More than 50 %.

9. *Who are the respondents?*

Directors of Human Resources Departments.

10. *How is the survey conducted?*

Questionnaire sent by post + telephone if necessary.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

Structured – see <http://www.fedil.lu/Publications/> for a pdf version.

12. *Which institution funds the survey?*

Partners + European Commission (Leonardo and Eures).

13. *Which institution is responsible for the survey?*

FEDIL and partners – See pdf version.

14. *Is there a plan to continue the survey in future? If yes, specify when and how often.*

Yes, each year.

15. *Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?*

To be discussed.

16. *Are the results of the survey published?*

See <http://www.fedil.lu/Publications/> for a pdf version.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

No.

Available documents:

- (a) Results of enquiry on 'Tomorrow's qualifications in the sector of information and communication technologies' (in French).
- (b) Results of enquiry on 'Tomorrow's qualifications in the sector of the technologies' (in French).

12. The Netherlands

Jasper van Loo, Research Centre for Education and the Labour Market (ROA)

Enquiry on Call Centres = CC

Enquiry on Metalelectronics = ME

Enquiry on Pharmacies = PH

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

CC: National contact centre benchmark survey (callcenter sector)

ME: Yes, there are several studies. In this document I will answer questions for study among firms in the Dutch Metalelectronics sector.

PH: Labour market monitor pharmacy sector.

2. *What are main objectives and key subject areas of the survey?*

CC: Providing key figures for call centre sector; questions on organizational policy, recruitment and provision of training

ME: Labour market analysis/monitoring, HRD policies, training, upgrading. Both current situation and future trends

PH: Aspects of work in Dutch pharmacy sector, including HRD, provision of training, training needs and skill gaps.

3. *How regular is the survey?*

CC: Each year, mostly same methodology, sampling and questionnaire. ROA has data on 2004/2005/2006

ME: Every 6 months from 2005 onwards. For 2002-2004 three or four surveys a year were held. A part of every questionnaire contains standard questions on labour market variables, the other part is reserved for special topics (which return each year) such as recruitment problems and policies, HRD, competencies, etc.

PH: 2001, 2003 and 2006, same sampling strategy and mostly same methodology and questionnaire..

4. *What is the unit of analysis?*

CC: Establishment

ME: Establishment

PH: Establishment.

5. *What is the sample size?*

CC: n=118

ME: 150-200 establishments, about 1/5 of all companies in the Netherlands metalelectronics industry.

PH: n=559.

6. *How is the sample constructed?*

CC: List of known call centres in the Netherlands (about 800)

ME: Firms willing to participate are contacted, results are weighed by sub-sector, region and establishment size.

PH: List of all pharmacy in the Netherlands (about 1600).

7. *Which classifications are in use?*

CC: No international classifications

ME: N/A, single sector, the sub-sectors can be classified by NACE.

PH: No international classifications.

8. *What is the response rate (in %)?*

CC: 19%

ME: About 20%.

PH: 35%.

9. Who are the respondents?

CC: Call centre managers

ME: Personnel managers, directors, or people responsible for HRM.

PH: Pharmacists.

10. How is the survey conducted?

CC: Questionnaire by mail and Internet

ME: Questionnaire link sent by e-mail, survey is available online.

PH: Questionnaire by mail and Internet.

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.

CC: Yes, structured questionnaire with topics: firm characteristics, budget, personnel (including recruitment and training), contact handling, utilities, and customers.

ME: Every questionnaire starts with thematic aspects, after this standard questions on vacancies, inflow, outflow of personnel are included.

PH: Yes, structured questionnaire with topics: firm characteristics, personnel, skills and training needs, HRM, personal characteristics.

12. Which institution funds the survey?

CC: Sponsors from call centre sector

ME: The Dutch education and training fund for the Metalelectronics industry (Stichting A+O)

PH: SBA.

13. Which institution is responsible for the survey?

CC: NCCBP

ME: The ROA (Research Centre for Education and the Labour Market) at Maastricht University.

PH: ROA (fieldwork: CentERdata).

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

CC: Yes, annually

ME: Yes, at least in 2007, possibly later too.

PH: Possibly.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

CC: Survey of 2004 is made comparable with survey of Global Call Centre Project (20 countries)

ME: Yes, if comparable sectoral studies with the same purpose are held in other countries.

PH: Yes.

16. Are the results of the survey published?

CC: General results can be found on www.nccbp.nl. Publications (see also www.roa.unimaas.nl):

- Sieben, I. & A. de Grip (2003). Competenties en skill gaps van callcentermedewerkers. Tijdschrift voor Arbeidsvraagstukken, 19: 34-47.
- Sieben, I. & A. de Grip (2004). Training and Expectations on Job Mobility in the Call Centers Sector, Journal of European Industrial Training: 28, 257-271.
- Sieben, I., A. de Grip & D. van Jaarsveld (2005). Employment and Industrial Relations in the Dutch Call Center Sector. ROA-R-2005/4E. Maastricht: ROA.
- De Grip, A., I. Sieben & D. van Jaarsveld (2006). De callcenterbranche in de Nederlandse arbeidsmarkt en arbeidsverhoudingen, Tijdschrift voor Arbeidsvraagstukken, 22(1): 71-83.
- De Grip, A., I. Sieben & D. van Jaarsveld (2006). Labour Market Segmentation Revisited: A Study of the Dutch Call Centre Sector. ROA-W-2006/8E, Maastricht: ROA.

ME: Some results may be found at www.arbeidsmarktmonitormetalektro.nl. These are, however in Dutch.

PH: Publications (see www.roa.unimaas.nl) also reports on www.sbaweb.nl.

- De Grip, A., J. Sanders & I. Sieben (2002). Knelpunten op de arbeidsmarkt en personeelsbeleid in de openbare apotheek, ROA-R-2002/11, Maastricht: ROA.
- De Grip, A. & I. Sieben (2002). Werken in de openbare apotheek, ROA-R-2002/13, Maastricht: ROA.
- Sanders, J., I. Sieben & A. de Grip (2003). Arbeidsmarktmonitor Apotheekbranche, Verkenning opzet tweede cyclus (2003-2005). ROA-W-2003/2, Maastricht: ROA.
- De Grip, A., M. Hensen & I. Sieben (2003). De arbeidsmarkt voor apothekersassistenten tot 2010: een toekomstverkenning, ROA-R-2003/6, Maastricht: ROA.
- Sieben, I., A. de Grip & M. Hensen (2004). Apothekers en de openbare apotheek: Arbeidsmarktmonitor Apotheekbranche 2003-2004. ROA-R-2004/4. Maastricht: ROA.
- Sieben, I., A. de Grip & M. Hensen (2004). Assistenten en medewerkers in de openbare apotheek: Arbeidsmarktmonitor Apotheekbranche 2003-2004. ROA-R-2004/9. Maastricht: ROA.
- De Grip, A & I. Sieben (2005). The Effects of Human Resource Management on Small Firms' Productivity and Employees' Wages. *Applied Economics*, 37: 1047-1054.
- De Grip, A., I. Sieben & F. Stevens (2006). Vocational Versus Communicative Competencies as Predictors of Job Satisfaction. ROA-RM-2006/3E, Maastricht: ROA
- Wognum, A., B. Veldkamp, A. de Grip & I. Sieben (2006). Ageing Workforce and Age-related Policies: A Secondary Analysis. Chapter 8 in: T.S. Rocco & J.G.I. Thijssen (Eds). *Older Workers, New Directions. Employment and Development in an Ageing Labor Market*. Miami: Center for Labor Research and Studies, Florida International University.
- Sieben, I., A. de Grip & W. Smits (2006). Arbeidsmarktmonitor Apotheekbranche 2005-2006. Nieuwegein: SBA.
- Wognum, I., B. Veldkamp, A. de Grip & I. Sieben (2006). Grotere arbeidsdeelname van ouderen door leeftijdsbewust personeelsbeleid? *Tijdschrift voor HRM*, 9 (1): 92-104.
- Wognum, I., B. Veldkamp, A. de Grip & I. Sieben (forthcoming). Leeftijdsbewust opleiden en ontwikkelen. In: W. de Lange, J. Thijssen & G. Evers (Eds.) *Personeelsbeleid voor oudere werknemers*. Weka.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

CC: No

ME: There is an employee survey in 2007, but this is carried out by another institution and the results cannot be merged.

PH: Yes.

Available documents:

- (a) CC: Questionnaire of 2005 – pdf file.
- (b) ME: Questionnaire in Dutch.
- (c) PH: Questionnaire in Dutch.

13. Poland

Krzysztof Symela, BKKK – Cooperation Fund – National Observatory

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

Research, which aim is to develop national vocational qualification standards in professions functioning in the economy, is being conducted in selected enterprises in Poland. For the purpose of building the vocational qualifications standards in Poland, the model based on concept of profession was adopted. This model is based on isolated occupational tasks, accompanied by sets of professional skills, knowledge, psychological and physical features. The model describes, in a disjunctive manner, the ‘components of professional qualifications’. Thanks to this approach, the Polish standard model has the advantages of modular construction, which is very necessary if this standard is used for modular vocational training. The further part of the questionnaire concerns on the project ‘Elaboration and dissemination of national vocational qualification standards’. This project is the system approach that is developed by the Ministry of Labour and Social Policy. Other, less important projects are listed in the question 17 and concern the training needs identification.

2. *What are main objectives and key subject areas of the survey?*

The most important aim of the research is to identify reasons for the wide application of the vocational qualification standards as an important tool supporting human resources development and also to state national standards required by employers in the scope of vocational qualification to provide high quality vocational and continuing education as well as its relation to the labour market. Another aim is to build systems of transparency and recognition of qualification obtained in a formal way and by the vocational experience. Research in the enterprises is especially concentrated on the professional tasks in the specified profession and on the skills, knowledge and psychological and physical characteristics required to the realisation of those tasks.

3. *How regular is the survey?*

The Ministry of Labour and Social Policy is in charge of implementing the Strategy in terms of development of vocational training and professional qualifications standards. In the years 1993-1997, the project ‘Adult Training’ was implemented, financed with a World Bank loan. The project resulted in development and update of the concept of International Labour Organization on building modules of employable skills. In the years

1998-2000, a PHARE-financed project was implemented, "Analysis of training needs - building professional qualifications standards in Poland". The project's results included a methodology for building national professional qualification standards, and descriptions of qualifications standards for eight professions: mechatronics technician, employee of financial and accounting units, employment agent, vocational counsellor, social worker, employee of self-government administration, technician – labour safety and hygiene, security employee. The above named activities were continued (2002-2004) by the Ministry of Labour and Social Policy under the PHARE 2000 Project "National Vocational Education System" of which main result was the development of the set of 40 standards of professional qualifications, based on analysis of requirements for the particular jobs. The elaborated standards are available from virtual database (www.standardyiszkolenia.praca.gov.pl) developed in the project. Moreover, during the realization of the project the research methodology and the questionnaire were verified and changed into actually applied version. Within another project Phare 2002 'Skills improvement of the Public Employment Services in the scope of putting into force European Strategy of Employment and participation in the EURES system' 7 standards for the professions of the labour offices were elaborated. Current project 'Elaboration and dissemination of the national vocational qualification standards' is another very important step in the area of developing and implementation to the general use of vocational qualification standards. The realization of the project is being planned for years 2004-2008. Within this project the task 'Preparing and conducting research in the enterprises for 200 professions/specialisation' is being realised..

4. *What is the unit of analysis?*

The element of the analysis is staff, especially:

- Employees working on the working places typical for specified profession.
- Direct superior of the employee in the specified profession (for example foreman or task group manager).
- Owner, director or another member of the management.

5. *What is the sample size?*

In the case of one profession research sample includes minimum 10 enterprises. Within each enterprise research involves 4 persons: 2 employees in the specified profession, direct superior of the employees and one representative of the management. 40 people fulfilled the questionnaire for specified profession. In the case of 200 professions for which research was conducted in the enterprises research sample included over 8000 people (40 people x 200 professions).

6. *How is the sample constructed?*

In the conducted research the sample had the objective character. Research group that was responsible for the research and for preparing description of the qualification standard for specified profession selects and characterises enterprises/ institutions that undergoes research. It was assumed that research sample should include small, medium-sized and large enterprises in more or less equal proportions. In justified cases, this criterion can be modified – this applies to professions performed usually, or solely, in small enterprises. It was assumed that if there is strong geographical diversity of a profession, the research sample should be a nationwide one, assuring representation of those regions where the performance of this profession may vary in terms of particular tasks. If, however, performance of occupational tasks does not depend on the geographical criterion, the authors' teams can select for their research enterprises located in a limited area, but rather broad one (one or two large cities, the area of a county, area of a whole province). In case where the authors' team is developing standards for professions of the same sector (the so-called related professions), the research can be conducted simultaneously in the same enterprises, or some enterprises can be repeated throughout the research (but all the researched professions must be properly represented among respondents from the given enterprise).

7. *Which classifications are in use?*

Conducted research is in line with Polish Classification of Professions and Specialisations. The classification was elaborated on the basis of an International Standard of the Profession Classification ISCO-88, established during XIV International Conference of the Labour Statistics in Geneva in 1987 and its new edition from 1994, called ISCO-88 (COM), which was adjusted to the needs of the European Union. According to these standards classification system, classification criteria and code system were established. Classification structure is based on the system of terms, from which the most important are: profession, specialisation, skills, vocational qualifications. Currently there are 1707 professions and specialisations in the classification.

8. *What is the response rate (in %)?*

There is about 95% feedback from the conducted research because of its national rank and additional research methods and techniques.

9. *Who are the respondents?*

Currently respondents are groups of people in 200 professions functioning in the economy (list of professions is available on the website: <http://www.mpips.gov.pl/index.php?gid=502>):

- An employee working on the working places typical for specified profession.
- Direct superior of the employee in the specified profession (for example foreman or the task group manager).
- Owner, director or another member of the management.

10. How is the survey conducted?

The questionnaire is mainly filled in during face to face interviews. It is possible to complete questionnaire and send it by post, but in that case the research team should keep in touch with the respondent to give necessary help and explanations. Similarly, conducting research by the Internet ('Internet form') or by e-mail is often used.

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.

The research of work places requirements in particular professions was conducted with the unified questionnaire that consisted following elements:

- List of occupational tasks, broken down into:
 - (a) technological/ execution tasks,
 - (b) organizational tasks,
 - (c) tasks of managing and cooperation,
 - (d) tasks tied to quality control and evaluation.
- The sets of skills, knowledge and psychophysical features corresponding to the individual tasks: Psychophysical features, presented in the following categories:
 - (a) sensory and motor abilities,
 - (b) skills,
 - (c) personality traits.
- List of positions for the profession.
- Data of the respondent.
- Data of the enterprise.

For the list of occupational tasks, skills, knowledge and psychophysical features, the respondents provided answers on a 4-degree scale – ‘very important – important – not important – useless’, placing ‘X’ in the appropriate table’s box. Positions were evaluated on a 3-degree scale: ‘typical for the profession – auxiliary for the profession – rarely seen’. The respondents could propose their own descriptions of occupational tasks, skills, knowledge, psychophysical features and positions, in the blank spaces on the questionnaire, left expressly for this purpose. Annex I presents the design of the questionnaire.

12. Which institution funds the survey?

Research is founded by the Labour Market Department in the Ministry of Labour and Social Policy with the use of European Social Found resources.

13. Which institution is responsible for the survey?

The institution responsible for realisation research in the project is consortium that includes: Counsellor Consultants Ltd. in Gdynia (Consortium Lider), Institute for Sustainable Technologies – National Research Institute in Radom (Instytut Technologii Eksploatacji – Państwowy Instytut Badawczy), Demos Polska Sp. z o.o. in Warsaw and Łódzkie Centrum Doskonalenia Nauczycieli i Kształcenia Praktycznego. Work is also subcontracted to following institutions: Institute for Educational Research of Ministry of National Education In Warsaw (Instytut Badań Edukacyjnych), Institute of Labour and Social Studies – ILSS in Warsaw (Instytut Pracy i Spraw Socjalnych), Institute for Social Research in Sopot (Pracownia Badań Społecznych).

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

The Minister of Labour is responsible for the co-ordination of work in elaboration of vocational qualification standards for professions from the classification of professions and specialisations. He is also responsible for coordination of work in conducting databases on vocational qualification standards (excerpt from the Act of 20 April 2004 on Employment Promotion and Labour Market Institutions). From this date research has been regulated (and required) by law. The Ministry of Labour and Social Policy sets deadlines and the scope of conducted research. Currently there are 53 vocational qualification standards being elaborated (elaboration of the next 200 standards is being planned until the end of 2007). Vocational qualification standards as well as the classification of them is the dynamic structure that changes with the changes in the work environment, technology, science, technology, etc. In that case updating of vocational qualification standards (every 3 years) should be considered as the natural effect that is connected with the development of specified professional area.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Institute for Sustainable Technologies – National Research Institute is currently the main co-ordinator of the research in the scope of vocational qualification standards in Poland. Expert, who fulfils this questionnaire, is the head of Vocational Education Research Department of the Institute. The Institute and Poland are interested in making outcomes of conducted research comparable to another countries. It is impossible to transfer vocational qualification standards from one country to another because the level of development of economies among European countries differs. They can be used to compare countries in different scopes. There are some thematic areas in which transfer of vocational standards between countries is possible like for example in ICT which is the global domain (unified software and hardware). Standard ECDL might be an example (European Computer driving licence). The similar situation is in the professions connected with welding.

16. Are the results of the survey published?

Books:

- Kwiatkowski S.M., Sepkowska Z. (eds.): Development of the professional qualifications standards in Poland. The Institute for Educational Research – Institute for Sustainable Technologies, Warsaw – Radom 2000.
- Kwiatkowski S.M., Symela K. (eds.): Professional qualifications standards. Theory – Methodology – Projects. The Institute for Educational Research, Warsaw 2001.
- Kwiatkowski S.M., Woźniak I. (eds.): Professional qualifications standards and educational standards. Relations – Models – Applications. The Institute for Educational Research, Warsaw 2002.
- Kwiatkowski S. M., Woźniak I. (eds): National Standards Professional Qualifications – Development and application. Ministry of Labour and Social Policy, Warsaw 2003 9 (PDF)
- http://www.mpips.gov.pl/_download.php?f=userfiles%2FFile%2Fnowe%2F1_Krajowe_standardyProjektowanieistosowanie.pdf
- Kwiatkowski S. M., Woźniak I. (eds): National Standards Professional Qualifications. The European context . Ministry of Labour and Social Policy, Warsaw 2003. (PDF)
- http://www.mpips.gov.pl/_download.php?f=userfiles%2FFile%2Fnowe%2F2_KrajoweStandardyKonteksteuropejski.pdf

- Pujol J. (eds.): Training Needs Assessment. Practical Methods and Tools. Leonardo da Vinci Project “European Bank for the Development of Modular Curricula and Educational Technologies – EMCET (PL/00/B/F/PP/140.179) ITeE, Radom 2003 (PDF)

Links:

- <http://www.mps.gov.pl/index.php?gid=502> – Information about the EFS SPO-RZL Project ‘Preparation and popularise of the national standards of professional qualifications’
- <http://www.mpips.gov.pl/index.php?gid=504> – Information about the PHARE 2000 Project ‘National Vocational Education System’

Research outcomes are also published in Journals:

- Education, Studies, Research, Innovations. Institute for Educational Research (www.ibe.edu.pl)
- Pedagogy of Work. Institute for Sustainable Technologies (http://www.itee.radom.pl/periodyki/pedagogika_pracy/o_czasopismie.htm)
- Polish Journal of Continuing Education. Institute for Sustainable Technologies (http://www.itee.radom.pl/periodyki/edukacja_doroslych/o_czasopismie.htm)
- Human Resources Management. Institute of Labour and Social Studies (<http://zzl.ipiss.com.pl/>)
- New Vocational Education. National Centre For Supporting Vocational And Continuing Education (http://www.koweziu.edu.pl/nez/rys_edu.htm).

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

Research concerning the training needs identification is conducted within projects realised by the Institute for Sustainable Technologies – National Research Institute in Radom:

- Staff development in the field of advanced technologies of production and maintenance (2005-2008) (identification of competencies concerning advanced technologies)
http://www.trainingvillage.gr/etv/projects_networks/ero/prj_view.asp?theID=641
- European Bank for the Development of Modular Curricula and Educational Technologies – EMCET 2 (www.emcet.net) (identification of competencies concerning modular training trainers)

- EQUAL Project Development for Partnership – Entrepreneurship in the web, Internet the opportunity for growth of competitiveness (www.pwsieci.pl) (identification of trade needs): graphic arts, clothing, footwear, photographic, timber)

In the 2006 year Central Statistical Office (Główny Urząd Statystyczny) carried out third research phase of ICT use in the enterprises of non-financial and financial sector and in household according to the Eurostat methodology that enables gaining comparable outcomes between member countries of European Union. (http://www.stat.gov.pl/gus/45_1510_PLK_HTML.htm).

Available documents:

- (a) Sample research questionnaire (in English).
- (b) Procedure for development of national professional qualifications standards (in English).
- (c) National standards for professional qualifications (in English).
- (d) National standards for professional qualifications – The European context (in English).
- (e) Training needs assessment.

14. Portugal

Maria do Céu Godinho, Ministry of Labour and Social Solidarity

1. *Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?*

Survey on the Needs of Vocational Training in Enterprises..

2. *What are main objectives and key subject areas of the survey?*

The main objectives of the survey are to identify labour shortages and skill gaps at enterprise level and to establish policies on vocational training..

3. *How regular is the survey?*

The survey is intended to be conducted every three years. The changes overtime relate to the questionnaires of the various implementations of the survey..

4. *What is the unit of analysis?*

The enterprise.

5. *What is the sample size?*

About 6000 enterprises with 10 or more employees, classified in NACE Rev.11 Sections C to O, excluding Section L and Sections M, N and O public. The survey carried out by the DGEEP covers Mainland Portugal. The number of enterprises in the corresponding universe is about 45600, representing 15,7% of the total number of enterprises with at least 1 employees in the concerned NACE Sections. The number of employees in enterprises with 10 or more employees represents 81,7% of the total number of employees in the same NACE Sections.

6. *How is the sample constructed?*

The sample is stratified by NACE Rev 1.1 Sections and Subsections, size of the enterprise and NUTS II. Results are disseminated by NACE and Size class of the enterprise.

7. *Which classifications are in use?*

The classifications in use are NACE Rev 1.1, ISCO 88 and the Classification on the Fields of Education and Training 1999, a project carried out by Eurostat and Cedefop.

8. *What is the response rate (in %)?*

About 70%.

9. *Who are the respondents?*

The person assigned by the enterprise, usually the responsible for HR.

10. *How is the survey conducted?*

Questionnaire sent by post, with telephone support.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

Yes. The structure is as follows:

- Economic characterization of the enterprise
- Situation towards Vocational Training (they have VT needs, existence of a VT plan, needs of external VT financing)
- Reasons for not providing VT (have enough, have recently provided VT, employees are not available, difficulty in accessing the needs, etc.)
- If there are needs, how does the enterprise intend to fill those needs:
 - (a) By providing VT to the present staff, employees;
 - (b) Hire new employees and then train them;
 - (c) Hire new employees already with the needed skills;
 - (d) Through the Apprenticeship System.
- For each of the situations above, the short and medium term needs, the fields of training and/or the occupation, the modality of VT and the number of persons needed
- What are the VT providers the enterprise intends to use to train their employees (the present staff and the staff to hire and train)..

12. Which institution funds the survey?

The survey has been funded by the Ministry for Labour and Social Solidarity.

13. Which institution is responsible for the survey?

In the Mainland, the survey is conducted by the Direcção-Geral de Estudos, Estatística e Planeamento of the Ministry for Labour and Social Solidarity.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

It is intended to continue the survey in the future, every three years. The first implementation of the survey took place in 1990. The last implementation of the survey took place in 1999, with reference to the years 2000 to 2002. Due to lack of resources, it was not carried out since then..

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Yes.

16. Are the results of the survey published?

Last publication (2000/2002) is available (only in Portuguese) through the DGEEP web site: www.dgeep.mtss.gov.pt, under 'Estatística'.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

Not that we know of.

Available documents:

- (a) Enquiry on necessity for vocational training in enterprises (in Portuguese).

15. Romania

Madlen Serban (MS), National Centre for Technical and Vocational Education Development

Cesar Birzea (CB), Institute for Educational Sciences

Catalin Ghinararu (CG), National Scientific Research Institute

1. Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?

MS: There were conducted two surveys targeting skill/qualification needs and skill gaps of the current and potential workforce, as part of a comprehensive set of actions. The first survey was conducted in 2005, on a representative sample of 2300 enterprises located in 7 development regions of Romania. The second survey, named by us the Employment Barometer Survey, was conducted in 2007 on a nationally representative sample of 3200 enterprises in all of the eight Romania's development regions.

CB: Yes. Two different surveys have been made: one survey is called "Social Impact of Continuing Vocational Training" CVT (published in 2001), the other survey is called "Skills Audit Survey" SAS (published in 2003).

CG: Yes it does but on an ad-hoc basis. The title of the last survey carried out was: "Short-term Assessment of the training and skill needs for medium and high-skilled workers".

2. What are main objectives and key subject areas of the survey?

MS: Both surveys intended to monitor the current situation in the regional labour markets and to identify trends in labour market imbalances, which could be indicative for TVET school provision planning.

CB:

- CVT - General goal: Design a methodology for evaluating the social impact of continuing vocational training, the extent to which the programmes run by various training providers – public or private – manage to promote employability, improve knowledge, abilities and professional skills as well as active citizenship, consequently targeting the aims of lifelong learning. Specific goals: 1. Identify a set of qualitative and quantitative indicators relevant for evaluating the social impact of CVT. 2. Starting from identified indicators, design evaluation tools for all key players that have joint responsibilities in providing continuing vocational training and, in the long run, lifelong education: individuals themselves, employers and social partners, the community and training providers. They are also the levels

where the impact of continuing vocational training is manifest. 3. Applying and validating evaluation tools on survey target groups corresponding to all the set levels of impact.

- SAS - Operating environment and the impact of external change on companies (in-company management changes, evolution of productivity in the context of new types of management and their impact on human resources, relationships of the company with other enterprises in the region and competitiveness at local and international level, development of new services and introduction of new product lines, carrying out research and development activities a.o.). Workforce characteristics and staff turnover (employee fluctuation, causes that affect workforce stability in the opinion of employers and improvement measures, relationship fluctuation – training needs, strategies for increasing productivity, a.o.). Characteristics and trends of workforce skills (deficit of workforce skills against labour market demand, occupational/operational areas where lack of skill is manifest, skills evaluation at company level, relationship between workforce skills and company performance, how surveyed companies deal with workforce deficit). Recruitment and filling vacancies (types of recruitment, recruitment of fresh graduates, current and anticipated difficulties in filling vacancies). Company policies in human resources development and training activities (evaluation of employee training needs, training strategy and the necessary resources, relation of training strategy with the general company development plan, access to training, main training methods and CVT providers).

CG: Training needs and identification of labour shortages and skills gaps.

3. *How regular is the survey?*

MS: The survey was designed for biannual application, but the lack of resources limited the scope. Therefore, the survey has been done on 2005 and 2007. The following things differed in the two surveys, conducted in 2005 and 2007:

- The surveys employed different questionnaires (see, please, Annex 1);
- The enterprise samples had different sizes;
- The 2007 survey was conducted in all of the eight development regions of Romania whereas the 2005 survey was conducted in 7 out of the 8 Romania's development regions.

Due to changes in the sampling and of the questionnaires the results are not comparable.

CB: Neither of the surveys mentioned above is regular. They both are one-time surveys. The CVT referred to data available in 2001 and the SAS used data available in 2003.

CG: The survey is not currently performed on a regular basis.

4. *What is the unit of analysis?*

MS: Whole enterprise.

CB:

- CVT – unit of analysis is the establishment (individuals, companies, vocational training centers, social partners and communities)
- SAS – unit of analysis is the companies/enterprises.

CG: The entire enterprise/organization.

5. *What is the sample size?*

MS: The sample size was decided on number of enterprises as mentioned in the answer for question 1.

CB:

- CVT – 5 counties; 30 companies; 38 continuing vocational training centers; 26 representatives of local authorities and NGO's; 32 social partners (employers' associations and trade union associations)
- SAS – 100 companies/enterprises from 5 counties.

CG: 1100 enterprises.

6. *How is the sample constructed?*

MS: The sample was stratified according to size, industry, and region.

CB:

- CVT – a targeted sample was used. Also weighting was done by region, type of enterprise and size.
- SAS – a targeted sample was used. Criteria used included, among other things, size of the enterprise, number of employees and form of property.

CG: The sample is usually constructed by stratification and weighting of the various types of enterprises.

7. *Which classifications are in use?*

MS: NACE and ISCO classifications were employed in both surveys.

CB: National classification used for companies economic field, partially comparable with the standard ones. ISCED classification used for initial education and training providers.

CG: The NACE and ISCED classifications are use. For the classification of occupations, the national “Classification of Occupations in Romania – COR”, is used.

8. *What is the response rate (in %)?*

MS: Between 70% and 74%.

CB:

- Around 30-35% response rate.
- Around 25-30% response rate.

CG: 94%

9. *Who are the respondents?*

MS: Heads of human resources departments, senior managers.

CB:

- CVT - Young graduates of pre-university education under 25 years of age, who were not employed at all before attending CVT courses; Unemployed adults, graduates of pre-university education who had had a job before becoming unemployed; People who are employed, graduates of pre-university and higher education, who have attended several training programs; managers, owners of enterprises, human resources managers; mayors, local councillors; NGO members; trade union leaders and members, representatives of employers organisations.
- SAS – employers and employers’ representatives.

CG: Respondents are regularly enterprise managers or HR managers.

10. *How is the survey conducted?*

MS: Both surveys were conducted using the face-to-face interview method.

CB:

- CVT – multiple questionnaires designed for each category or group investigated. Face to face.
- SAS – questionnaires, face to face interviews and document analysis.

CG: Face to Face.

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.

MS: Firm's characteristics (i.e., size, industry, property form)

Employees' characteristics (gender, age, and education)

Vacancies by education and qualifications level (last 6 months)

Personnel shortages/needs (last 6 months)

Inflow of labour by occupation (last 6 months)

Expectations of employment (6 and 12 months ahead).

CB:

- CVT - The evaluation questionnaires designed for direct CVT beneficiaries. They are aimed at general information and context variables referring to the individual (sex, age, level of education, trade/profession, job status, graduated courses, etc.), information on employability and increase in individual and collective competitiveness (effects of training programs on professional insertion – in the case of unemployed – developed professional and social competencies, development of active attitudes on the labour market, etc.) on-the-job participation (work management, initiative in current job and in improving work relationships), civic participation (activities in political organisations, NGOs, the religious community, in tenants' associations, etc.; trends with respect to people's confidence in public institutions and voting; trends regarding the extent to which ethnical diversity is accepted). The questionnaire is meant to reveal to what extent individuals are aware of the need for CVT and their level of motivation. The evaluation questionnaires designed for companies. They request general information related to human resources, company/enterprise policy on human resources development (the existence of a strategy for continuing training of employees, organised training programs, non-formal forms of education, etc.), the impact of CVT on individual and collective competitiveness (professional and social competencies developed in CVT programs, career progression, etc.), on-the-job participation (activity management, initiative in current professional activity and improvement of work relationships), civic participation. The questionnaires designed for direct beneficiaries and companies are generally focused on the same criteria and indicators, the same aspects, attempting to reveal a twofold perspective on the social impact of CVT: that of the beneficiary and the employer. The evaluation questionnaires designed for training providers. They comprise general information (type of provider – public/private, etc. – curricula offer, developed competencies, material and human resources and information related to the professional insertion of graduates of CVT programs (in the case of courses organised for the unemployed). The questionnaire may be used as a tool for institutional evaluation and self-evaluation as well as to evaluate the job offer from the perspective of promoting employment and an active civic attitude. It also assesses the way in

which the job offer adjusts to individual training needs, which is one of the goals of lifelong learning. The questionnaire applied at community level (local authorities, NGOs, etc.). It refers to aspects of the relationships between the members of the community with local authorities, activities at community level involving citizens' participation, trends related to citizens' trust in public institutions, to the extent of their acceptance of ethnic diversity. Consequently, the survey of the various organisations and representatives of the community is aimed at highlighting the changes that have occurred in the attitudes and behaviour of citizens with respect to the aforementioned aspects. These changes do not necessarily have to be in a cause effect relationship with participation in various training programs. The questionnaire designed to be applied for social partners. It is focused on the following aspects: social dialogue and its efficiency, human resources development policies, interest in investing in vocational training, development of social partners' institutional capacities.

- SAS – The questionnaires used covered the following key areas: Operating environment and the impact of external change on companies (in-company management changes, evolution of productivity in the context of new types of management and their impact on human resources, relationships of the company with other enterprises in the region and competitiveness at local and international level, development of new services and introduction of new product lines, carrying out research and development activities a.o.); Workforce characteristics and staff turnover (employee fluctuation, causes that affect workforce stability in the opinion of employers and improvement measures, relationship fluctuation – training needs, strategies for increasing productivity, a.o.); Characteristics and trends of workforce skills (deficit of workforce skills against labour market demand, occupational/operational areas where lack of skill is manifest, skills evaluation at company level, relationship between workforce skills and company performance, how surveyed companies deal with workforce deficit). Recruitment and filling vacancies (types of recruitment, recruitment of fresh graduates, current and anticipated difficulties in filling vacancies). Company policies in human resources development and training activities (evaluation of employee training needs, training strategy and the necessary resources, relation of training strategy with the general company development plan, access to training, main training methods and CVT providers). The questionnaire was adapted using a template provided by the financing institution (European Training Foundation).

CG: Yes the questionnaire was structured; The structure included questions on various specific issues such as:

- economic performance of the enterprise;
- human resource policies;
- flows of workers in and out of various occupations and skills in the enterprise;

- deficits and skills shortages;
- training programs;
- very-short and short term forecasts on profile-changing occupations in the enterprise.

12. Which institution funds the survey?

MS: The two surveys were commissioned by the National Centre for TVET Development (an institution working under the Ministry of Education, Research and Youth coordination) and were financed under two PHARE projects.

CB: European Training Foundation (Torino) within additional programs for Romanian National Observatory, Institute of Education Sciences.

CG: The Ministry of Labour, Social Solidarity and Family with World Bank co-financing.

13. Which institution is responsible for the survey?

MS: The first survey was contracted with the National Research Institute for Labour and Social Protection from Romania and SC CURS SA. The second survey was implemented by the Phare 2004 Technical Assistance with the support of local experts selected from the same specialized company SC CURS SA.

CB: Romanian National Observatory, Institute of Education Sciences.

CG: The National Research Institute for Labour and Social Protection.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

MS: The plan is to continue the survey on biannual basis. In this respect the National Centre for TVET Development will submit an ESF funded project.

CB: Yes, linked with impact evaluation of different HRD Programs (i.e. financed by structural funds) not on a regular basis.

CG: Unknown, yes in principle.

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

MS: Yes, we are very interested in conducting comparative studies on such topics.

CB: Yes.

CG: Yes.

16. Are the results of the survey published?

MS: The first surveys results are published on the NCTVETD website as part of labour market study. www.tvet.ro. The second survey results are to be published by the end of first semester 2007 on the same web site.

CB: Surveys can be freely downloaded after a short registration.

- <http://obsro.ise.ro/DesktopDefault.aspx?tabid=30>.
- <http://obsro.ise.ro/DesktopDefault.aspx?tabid=30>.

CG: Yes. No electronic copy is available and it cannot be found on the website but paper copies are available and one will be provided to the Cedefop as part of the current exercise.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

MS: As far as we know, some other enterprise surveys were conducted by the National Institute for Scientific Research in the Field of Labour and Social Protection (NISRFLSP) e.g.: “Evolution of Occupation on the Romanian Labour Market- 2010 perspective” (survey conducted in 2006 by NISRFLSP in cooperation with CURS S.A; beneficiary - Ministry of Labour, financed by the World Bank”) – sample size: 1100 companies.

CB: Research tools to be found in Social Impact Of Continuing Vocational Training (available for free download at the web link mentioned above at question 16.) page (67 – 102).

CG: Yes. Monographic research on 150 occupations.

Available annexes:

- (a) MS: Questionnaire for the survey in 2005 (in Romanian)
- (b) MS: Methodology of the second survey, 2007 (in English)
- (c) CB: Survey SAS

16. Slovakia

Juraj Vantuch, Comenius University

1. Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce?

There is no standardised instrument for this kind of surveys according to State Institute of Vocational Education (Education ministry, MoE) as well as Institute for Labour and family Research (Labour ministry, MoLSAF) and Trexima Ltd (MoLSAF affiliated LM analysing private institution) developed yet . Currently, there are some LM forecasts

- based on macroeconomic model elaborated by Infostat, (Vaňo, B. : Labour force forecast in Slovakia until 2025 Bratislava, INFOSTAT, 2006, only Slovak version available at <http://www.infostat.sk/vdc/pdf/pracsily.pdf>)
- based on ad hoc questionnaire elaborated by Chamber of Commerce in Zilina (covering the country not just the region; the report is officially not accessible, just parts were made public within diverse articles and conference papers)
- based on sectoral analysis e.g. in automotive industry (some data made public within diverse articles and conference papers)
- there is a new survey elaborated by SIOV, I am going to refer to within next questions (see also annex).

2. What are main objectives and key subject areas of the survey?

Focus is on VET schools graduates and estimation of LM needs of graduates: Estimation of number of jobs created by sectors, Vet schools graduates profiles required, estimation of graduates by sectors, by levels of education, and with regard to key competences (not exactly equal to “EU” ones) (See respective items in annexed questionnaire).

3. How regular is the survey?

There is no regular survey on this in SR. The SIOV survey is an ad hoc questionnaire , to be administered in June-July 2007.

4. What is the unit of analysis?

Enterprises are addressed, but very likely organisation specialists (if available) will respond.

5. *What is the sample size?*

N=5 000 according to preliminary information of SIOV.

6. *How is the sample constructed?*

Only sample size is known, however according to SIOV it should be a NACE stratified sample. I assume that also size, status and geography will be reflected.

7. *Which classifications are in use?*

NACE, ISCO, ISCED classification are used. National classification are compatible with.

8. *What is the response rate (in %)?*

Not yet known.

9. *Who are the respondents?*

Not yet known.

10. *How is the survey conducted?*

Questionnaire sent by post.

11. *Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.*

See the annex.

12. *Which institution funds the survey?*

SIOV / Ministry of Education.

13. *Which institution is responsible for the survey?*

SIOV.

14. Is there a plan to continue the survey in future? If yes, specify when and how often.

Yes, depending on MoE/ Government requirements and funding possibilities (ESF?).

15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?

Yes, cooperation was initiated by Comenius University (and preliminary agreed by SIOV, Institute for Labour and family Research, and Trexima Ltd) to create a research team looking for selection and adoption of appropriate research instruments and for funding schemes (grants).

16. Are the results of the survey published?

See answer to item 1, preliminary results from the SIOV survey are expected by July 2007.

17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

See answer to item 1.

Available annexes:

(a) SIOV survey (in Slovak).

Annex: full template

Enterprise surveys as a tool for identification of skill needs

Template for country experts

Please fill in answers to the following questions:

1. Does your country conduct an enterprise survey which allows to identify skill/qualification needs and skill gaps of the current and potential workforce? Please specify the title of the survey. *In case there are several surveys, please answer following questions separately for each survey.*
2. What are main objectives and key subject areas of the survey (e.g. training needs analysis, HRD policies in enterprises incl. provision of training, identification of labour shortages and skill gaps etc.)?
3. How regular is the survey? In case of regular multi-year surveys, please specify years of surveys and please specify whether results are comparable across time (i.e. specify whether there was any change in methodology, sampling, questionnaire etc.)?.
4. What is the unit of analysis: establishment or the whole enterprise/organisation?
5. What is the sample size (number of establishments/enterprises, volume of the workforce covered)?
6. How is the sample constructed (stratification, targeting, weighting by types of enterprises, e.g. public/private/non-for-profit, by size, region, industry etc.)? Is it a regular sample on enterprise biography?
7. Which classifications are in use (e.g. NACE, ISCO, ISCED, in case of alternative national classifications please mention whether they are comparable with the standard international ones)?
8. What is the response rate (in %)?
9. Who are the respondents, i.e. who actually answers questions?
10. How is the survey conducted (e.g. questionnaire sent by post, interview method - telephone, face-to-face, CATI/CAPI etc.)?

11. Do you use a structured questionnaire? Please provide more information on the thematic structure of the questionnaire.
12. Which institution funds the survey?
13. Which institution is responsible for the survey?
14. Is there a plan to continue the survey in future? If yes, specify when and how often.
15. Would your institute / your country be interested in finding a way to make your survey results comparable to similar efforts in other countries?
16. Are the results of the survey published? Please provide us with links to publications on the Internet. In case of paper-version publications, please provide titles/authors/publishers etc. We would appreciate to receive a copy of the latest results if possible.
17. Are there complementary employee surveys with similar objectives, and are these merged with the enterprise survey?

Please provide a questionnaire in the **Annex 1**, preferably in English (if not available, please attach it in your language).

If you wish to attach any additional information (e.g. on sampling method etc.), please attach it in **Annex II**.