

Feasibility study: employers' surveys as a tool to assess skill needs

Interviews with experts: main results

Skillsnet Expert Workshop

Milan, 7-8 May 2009

Aims of the interviews

- To assess the point of view of the experts from DG Employment, Social Affairs and Equal Opportunities (DG EMPL), DG Education and Culture (DG EAC), DG Enterprise and Industry (DG ENTR);
- To assess the point of view of the experts of other institutions, such as OECD, and of other stakeholders that actively operate in the labour market, such as trade unions and enterprises associations

Usefulness of employers' surveys to assess skill needs

- Employers' surveys are a valid tool to assess skill needs in the short-term
- For medium- or long-term forecasts, employers can provide only information on the general tendencies



Can employers be convinced to “make an effort”
and predict their future needs?

Employers' surveys would complement:

- Cedefop's long-term forecasting;
- Information on vacancies provided by the PES to the Commission

Information on skill needs also important for the Commission's purposes:
need of statistical information on the core indicators for monitoring progress
towards the Lisbon objectives and also beyond 2010.

Investigate occupational structure, vacancies, or training?

**No clear consensus:
The three approaches appear to be possible and valid**

Eurostat surveys:

- on vacancies - Job Vacancy survey and PES Vacancy monitor: only current and past vacancies, no sufficient detail on occupations
- on training - CVTS: it is necessary to have information on the type of training provided, the survey touches this issue only marginally



**Data currently available at Eurostat are not sufficient for the
assessment of skills needed in the future**

Which would be the “best option”?

(Three possible options: modification of EU surveys, adjustment of national surveys, launching of a new European survey)

No clear consensus on this aspect

Adjustment of national surveys:

- To what extent are the methodologies different?
- In some Member States there are no surveys at all
- Will Member States agree to change their surveys?
(Commission’s role of major importance)

Adaptation of EU surveys or launching of a new European survey:

- In strong collaboration with Eurostat

The Commission's initiatives

- **New Skills for New Jobs:**
lack information on skill needs; employers' surveys would complete the information that is missing
- **Vacancy Monitor:**
will focus on favouring the matching between labour demand and supply;
no "overlapping" with possible employers' surveys
- **DG EAC policies on training and education:**
information on formal, non formal and informal training useful;
the Leonardo da Vinci programme could also benefit from information coming from the employers' survey
- **"Eurooccupations" project:**
online database with task descriptions, competences, required education, certificates and 'on-the-job-training'

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State of the art in the Member States

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The Member States that provided information

- Two thirds of the MS replied to Cedefop's questionnaire on the national surveys
- AT, BG, IE, HU, LV, RO, SI had however provided information for the 2007 or 2008 workshops
- In 2009, information for the UK is available separately for England, Northern Ireland, Scotland and Wales

	Bucharest 2007	Paris 2008	Feasibility study 2009
Austria		Y	
Belgium	Y	Y	Y
Bulgaria	Y	Y	
Cyprus			Y
Czech Republic	Y	Y	Y
Denmark			
Estonia	Y		Y
Finland	Y	Y	Y
France	Y	Y	Y
Germany	Y		Y
Greece	Y	Y	Y
Hungary		Y	
Ireland	Y		
Italy		Y	Y
Latvia	Y	Y	
Lithuania		Y	Y
Luxembourg	Y		Y
Malta			Y
Netherlands	Y		Y
Poland	Y		Y
Portugal	Y	Y	Y
Romania	Y	Y	
Slovakia	Y	Y	Y
Slovenia		Y	
Spain		Y	Y
Sweden			
United Kingdom	Y	Y	Y
TOTAL	17	17	18

Which types of surveys are conducted in the MS?

	Occupational structure	Occupational needs (vacancies)	Training by enterprises
Belgium	<i>Discontinued</i>		
Cyprus	Y		
Czech Republic	Y	Y	Y
Estonia	Y	Y	
Finland	Y		
France		Y	
Germany	Y	Y	Y
Greece	Y	Y	
Italy	Y	Y	Y
Lithuania	Y	Y	Y
Luxembourg	<i>No details available</i>		
Malta	<i>No national survey</i>		
Netherlands	Y	Y	
Poland	Y		
Portugal	Y		
Slovakia		Y	
Spain	Y		
UK - England	Y	Y	Y
UK - Northern Ireland	Y	Y	Y
UK - Scotland	Y	Y	Y
UK- Wales	Y	Y	
TOTAL	16	13	7

- Across the 18 MS that replied to the questionnaire, in BE and MT no national surveys are conducted (data for Luxembourg are incomplete)
- Surveys on training are available in relatively few countries

Surveys on the occupational structure: methodology

	Name of survey	Frequency		Months to conduct survey	Sectoral classific. used	Sectoral detail reliable results	Is sample survey	Sample size	Exclusions
CY	Employment Survey	Regular	every three months	3	NACE	2-digit	Y, only for SMEs	2.500	--
CZ (*)	Average Earnings Survey	Regular	every three months	2,5	NACE	1-letter	Y, only for SMEs	3.500	Enterprises with less than 10 persons employed
DE (**)	The IAB Establishment Panel	Irregular	2007, intended 2008, 2009	4	Nace compatible	2-digit	Y	16.000	--
GR	Business Skill Survey - BSS-2	Irregular	2003, 2006	12	NACE	1-letter	Y	1.200	--
EE	Hourly wages of male and female workers	Regular	every year	30	NACE	1-letter	Y	8.800	--
ES	Industrial Enterprises survey	Regular	every year		NACE	3-digit	Y	44.100	--
FI	Labour force and skill needs survey of EK	Regular	every year	4	NACE	3-digit	Y	4.500	Enterprises with less than 3 employees
IT	Excelsior information system	Regular	every year	5	NACE compatible	2-digit	Y, only for SMEs	100.000	Enterprises without employees
LT	Sectoral studies	Irregular	1999-2000; 2003-2004; 2006-2007 (each relates to different sectors)	4	NACE	2-digit	Y	1000 per sector	--
NL	OSA Labour Demand Panel (Dutch).	Regular	every two years	18	NACE compatible	1-letter	Y	2000-3000	Enterprises with less than 5 employees
PL	Labour market in Poland	Regular	every year						
PT	Lists of personnel (administrative sources)	Regular	every year	1 year (?)	NACE compatible	4 digit	No - covers all employees		Enterprises without employees
UK - England	National Employers Skills Survey (NESS)	Regular	originally 2003-2005, now two yearly	10	Nace compatible	4 digit	Y	75.000	Establishments with less than 2 employees
UK - NI	The Northern Ireland Skills Monitoring Survey	Regular	every 3 years	9	Nace compatible	1-letter	Y	4.000	Excluded enterprises with no employees
UK - Scotland	Scottish Employers Skill survey	Regular	every 2 years	9	Nace compatible	1-letter	Y	6.274	Excluded enterprises with no employees
UK - Wales	Future Skills Wales	Irregular	1998, 2003, 2005	12	Nace compatible		Y	6.719	--

Surveys on the occupational structure: key variables

	Occupations	Iscol detail occupations	Educational attainment of employees	Hierarchical levels of employees	Business area where employees work	Survey conduction
CY	N		N	N	N	Telephone interviewing
CZ (*)	Y, ISCO	4 digit	Y, ISCED compatible	Y	N	Electronic transfer of data (?)
DE (**)	N	--	Y, non ISCED-compatible	Y	N	CAPI
GR	Y, ISCO	1 digit	Y, ISCED	Y	N	Face to face interviews
EE	Y, ISCO	4 digit	N	Y	N	Postal questionnaire
ES	n.a.	n.a.	n.a.	Y	n.a.	Postal questionnaire
FI	Y, NON compatible with ISCO		N	N	N	Web-based questionnaires
IT	N		N	Y	N	CATI
LT	Y, ISCO compatible		N	Y	N	Potal + sometimes face to face interviews
NL	N		Y, ISCED compatible	Y	N	CATI + postal questionnaire
PL				N	N	not specified
PT	Y, ISCO compatible	4 digit	Y, ISCED compatible	Y	N	Electronic transfer of data (?)
UK - England	Y, ISCO compatible	1 digit	N	N	N	CATI
UK - NI	Y, ISCO compatible	1 digit	N	N	N	CATI
UK - Scotland	Y, ISCO compatible	1 digit	N	N	N	CATI
UK - Wales	Y, ISCO compatible	3-digit	N	N	N	CATI

Surveys on vacancies: methodology

	Name of survey	Frequency		Months to conduct survey	Secotral classific. used	Sectoral detail reliable results	Is sample survey	Sample size	Exclusions
CZ	Database of job vacancies conducted by the labour offices	Regular (database updating)	Statistics available monthly and quarterly		NACE compatible	4 digit	No, covers all enterprises	--	--
DE	The IAB Establishment Panel	Irregular	2007, intended 2008, 2009	4	Nace compatible	2-digit	Y	16.000	--
EE	Sector study of Estonian metal-, machinery- and apparatus industry	Irregular	2001	6 - 9	NACE	2-digit	No, covers all companies in sector	250	--
FR	Panel 'enterprises forecasts'	Regular	every year	5	NACE	depends on type of industry	Y	15.000	--
GR	Business Skill Survey - BSS	Irregular	2006	12	NACE	1-letter codes	Y	1.200	--
IT	Excelsior information system	Regular	every year	5	NACE compatible	2-digit	Y	100.000	Enterprises without employees
LT	Employers survey for labour market forecasts	Regular	every year	4	NACE	4 broad groups	Y	5.300	--
NL	OSA Labour Demand Panel (Dutch)	Regular	every two years	18	NACE compatible	1-letter codes	Y	2000-3000	Enterprises with less than 5 employees
SK	"SIOV Survey"	Irregular	April-June 2007	1	NACE	2-digit, reliability questioned	Y	385/1.800	--
UK - England	National Employers Skills Survey (NESS)	Regular	originally 2003-2005, now two yearly	10	NACE compatible	OTH - sic 2003 4 digit	Y	75.000	Establishments with less than 2 p. employed
UK - Northern Ireland	The Northern Ireland Skills Monitoring Survey	Regular	every 3 years	9	NACE compatible	1-letter codes	Y	4.000	Enterprises without employees
UK - Scotland	Scottish Employers Skill survey	Regular	every 2 years	9	NACE compatible	1-letter codes	Y	6.274	Enterprises without employees

Surveys on vacancies: key variables

	Vacancies: past, less than year before	Vacancies: current	Vacancies: future	Vacancies : other info	Difficult to fill vacancies	Difficult to fill vacancies: reasons	Occupation relating to each vacancy	ISCO detail for occupations
CZ		Y					Y, ISCO	4 digit
DE	Y				Y	Y		
EE		Y			Y	Y	Y, no classification	
FR	Y		Y - next 10-12 months		Y			
GR		Y						
IT			Y, next 12 months		Y	Y	Y, ISCO compatible (at the 3-digit level)	3 digit
LT	Y		Y, next month		Y		Y, ISCO compatible	4 digit
NL				<i>see OSA website</i>	Y			
SK		Y, for VET graduates	Y (all vacancies), 12 and 24 months		Y (only for VET graduates)			
UK - England		Y			Y	Y	Y, ISCO compatible	1 digit
UK - Northern Ireland	Y	Y			Y	Y	Y, ISCO compatible	1 digit
UK - Scotland		Y			Y	Y	Y, ISCO compatible	1 digit

Preliminary conclusions concerning national surveys

Surveys on occupational structure	Surveys on vacancies
In no Member State except the UK there is a direct assessment of skill needs (i.e. skill gaps)	In no Member State except the UK there is a direct assessment of skill needs (i.e. skill shortages)
In order to be compared surveys have to be conducted on a regular basis, and with similar frequencies. However, according to the information received, at present they are regular in ten Member States, and frequencies are often different	In order to be compared surveys have to be conducted on a regular basis, and with similar frequencies. However, according to the information received, at present they are regular in six Member, and frequencies are often different
The disparities concerning the key variables are considerable, and therefore the adjustments of the national questionnaires would not only concern the inclusion of new questions, but would possibly imply a revision of the variables surveyed	Some Member States assess the past or current vacancies while others forecast the future ones; the two types of information are complementary but are not directly comparable
In Portugal data are obtained through administrative sources, and therefore it appears difficult to include new variables, especially if qualitative in nature	In the Czech Republic data are obtained through administrative sources, and therefore it appears difficult to include new variables, especially if qualitative in nature
	The fact that most countries already assess the difficulties in filling in the vacancies together with the reasons for the difficulties, is certainly positive, as this is the starting point of an evaluation of skill mismatches in the labour market
Problems deriving from the sample sizes, the sectoral coding, and the sectoral coverage appear to be less critical (although the impact of the exclusion of very small enterprises or establishments should be evaluated).	Problems deriving from the sample sizes, the sectoral coding, and the sectoral coverage appear to be less critical (although the impact of the exclusion of very small enterprises or establishments should be evaluated).