



editorial

THE YEAR 2009 has been very lively for Cedefop's Skillsnet network. In the first semester, Cedefop worked hard on a feasibility study of employer skills surveys and the results led to the launch of a multiannual project to develop and pilot a new employer survey to identify skill needs in Europe. We discussed the first results of the feasibility study during a major workshop in May in Milan. These

discussions continued during the major Agora conference in June in Thessaloniki organised with the European Commission. The Agora also announced the results of the first pan-European forecast of skill supply in Europe.

Cedefop will continue to be involved in the Community initiative on 'New skills for new jobs' and cooperate closely with the European Commission to fulfil a request of the European Council (March 2008) to provide a regular comprehensive assessment of Europe's future skills requirements and propose ways of anticipating future needs. Development of a system for regular forecasts of skill supply and demand for Europe is in progress. Two workshops took place this year and first results of the simultaneous forecasts considering the impact of the economic crisis will be announced at the beginning of 2010.

Work on sectors continues in a green way. Cedefop, in close cooperation with the ILO, is conducting applied policy research into skill needs for greener economies covering several countries worldwide. The study looks, in particular, at new and changing occupational profiles, greening existing occupations and identification of obsolescent skills and occupations.

Cedefop is determined to build on the results achieved so far and carry out more analysis in the future. Continuity of work and cooperation with Skillsnet members and partners is key for bringing new ideas and making progress in anticipating skill and labour market developments at European level. The next Cedefop conference on skills is planned for autumn 2010 and we hope to meet you there to discuss our work and your ideas.

Cedefop skills analysis team

AGORA CONFERENCE LOOKED AT HOW BEST TO MATCH SKILLS AND JOBS

On 11 and 12 June 2009 Cedefop organised, in cooperation with the European Commission, an Agora conference entitled 'Matching skills and jobs: anticipating needs in challenging times'. Around 150 delegates from different backgrounds – experts, researchers, policy-makers, social partners, practitioners, etc. – from across Europe attended the conference. They had the opportunity to discuss the findings of the first pan-European skill supply forecast up to 2020 and how these results relate to the Commission's initiative 'New skills for new jobs'.



No seat left in the conference room ...

The aim of the conference was not just to disseminate the results of the skills supply study, but also to debate how it complements the findings of Cedefop's skill needs forecast of 2008, how best to identify skill mismatches, how to achieve the most appropriate partnerships between education and employers, and generally to draw attention to the implications of the forecasting exercises for policy-making in several related social fields.

The conference confirmed that pan-European forecasts, despite their inevitable shortcomings (which are mainly due to data collection differences) are a boon to the current policy agenda. However, they need to be complemented by other qualitative and quantitative information and sector-based research. In fact, Cedefop and its Skillsnet network are already working on several such projects which are also covered in this newsletter.

The next Cedefop conference which will discuss new projections of skill supply and demand for Europe in detail is planned for autumn 2010.

All presentations from the conference are available online on the conference website:

<http://agora.cedefop.europa.eu/skills2009/>

FUTURE SKILL SUPPLY IN EUROPE: FIRST RESULTS

To promote the right match of skills and jobs, Cedefop produced a first medium-term forecast of skill supply in Europe which complements the forecast of skill needs published in 2008. The new publication 'Future skill supply in Europe: medium-term forecast up to 2020' provides complementary information on how many people with different qualifications will be available in future labour markets.

The results suggest further substantial increases in the supply of people with both high and medium qualifications across Europe. In contrast, the proportion of people with low levels of qualification is projected to experience a decline across Europe. These general positive trends are observed in almost all countries and they are in line with the Lisbon agenda, which aims to raise the proportion of people holding higher level educational qualifications. One concern for policy-makers is whether or

not the historical trends identified will continue undisturbed by the recent economic crisis, or whether people will make different choices related to their desired level of education.

HIGH QUALIFICATIONS ON A STEADY RISE

The proportion of people with high levels of qualification has shown a steady rise in recent years in most countries. The baseline scenario projects that between 2007 and 2020 the European labour force (EU-25 without Malta, plus Norway) aged 25 and more holding high level qualifications will increase by 20 million people and will represent 34% of the whole labour force in 2020.

PEOPLE WITH MEDIUM-LEVEL QUALIFICATIONS REMAIN THE CORNERSTONE OF OUR ECONOMY

The European labour force holding medium-level qualifications will increase by more than

- ▶ five million people in the projection period. This group will remain the major part of the whole labour force (48%) in 2020.

LOW QUALIFICATIONS ON THE RETREAT

The proportion of those holding low or no qualifications are steadily falling. Between 2007 and 2020, the European labour force will shrink by more than 17 million people. In 2020, low-skilled people will represent 17.7%, compared to 27% in 2007.

YOUNGER WOMEN BETTER QUALIFIED THAN MEN

The results for all those people in the labour force aged 25 to 64 confirm the general trends. The rates of increase are generally higher for

women than men. This implies that women generally will be (formally) higher qualified than men in the future. For the age group 25 to 29 the increase in numbers with high qualifications is much sharper, especially for women. The age group 30 to 39 is projected to experience some of the largest increases at high level. The number of people holding medium qualifications as their highest qualification is projected to decline for all the groups aged up to 39, but to increase for the groups aged 40+. This reflects cohort effects as people are ageing and the fact that younger people today are in general better qualified than older people.

The forecast was developed and carried out in cooperation with country experts from

Skillsnet. The draft final results were discussed during the workshop held in Cambridge on 11 and 12 December 2008. However, although the forecast was discussed with country experts, use of common models and assumptions does not always allow 'local' knowledge of detailed policy and other factors that may affect supply of skills to be incorporated. The results, therefore, have to be put into context and improved with other qualitative information before any policy recommendations are made.

More information and the full report are available at: www.cedefop.europa.eu/skillsnet under the section 'Forecasting'.

DEVELOPING REGULAR FORECASTS OF SKILL SUPPLY AND DEMAND FOR EUROPE

Eminent interest in Cedefop's forecasts from various stakeholders confirms the need to monitor regularly likely skill needs and other current and future developments on the labour market. Cedefop has launched a new project to develop a system for regular forecasts of skill supply and demand in Europe. These forecasts will be carried out simultaneously to allow for comparison and analysis of potential labour market imbalances.

In 2009, more than 40 experts attended two workshops dedicated to this project. The first workshop took place in Thessaloniki in June 2009 and discussed the methodology and approaches to be used for the regular forecasts of skill supply and demand. The second workshop took place in Malta in October 2009 and focused on the data used, applied scenarios and mainly the interim results.

The outcomes of both workshops as well as detailed comments



Skillsnet country experts which came to Malta to discuss the interim findings...

received from country experts will be used for the final results of the first simultaneous projections which are expected to be announced early in 2010. Updated projections will be provided every two years.

FEASIBILITY STUDY ON EMPLOYER SURVEYS POINTS THE WAY FORWARD

In 2009, the feasibility study on employer surveys as a tool to identify skill and competence needs at workplace level moved on and brought some interesting findings to light.

Interim results of the feasibility study were discussed with Skillsnet experts during the workshop 'Employers' surveys as a tool for identification of skill needs: feasibility study' which took place in Italy in May 2009. Thirty-eight experts from 18 Member States, from several international and European institutions and organisations came to Milan to discuss different approaches used in employer surveys for assessing skill needs. Characteristics of national employers' surveys currently available in Member States as well as the characteristics of EU surveys were examined to identify which of them could provide a basis for possible adjustment or modification, for example, by including questions on skill needs, skill development and relevant strategies in enterprises.

In the framework of the Agora conference 'Matching skills and jobs: anticipating needs in challenging times' in June 2009 a special working group was dedicated to employers' surveys on skill needs. This working group



Lively discussions during a coffee break ...

discussed the interim results of the feasibility study with a wider audience. The session came to the conclusion that further exploration of the different options for employer surveys is needed, keeping in mind that future-oriented questions in such surveys should not be overestimated as many employers have difficulties in predicting longer-term prospects. It was also emphasised that employers' surveys need 'well designed simplicity'.

Both workshop and working group discussions fed into the final results of the feasibility study which concludes that the only option that allows full comparability of results across

countries is a new survey at European level dedicated specifically to the issue of skill needs in enterprises. However, efforts to include relevant questions into the next round of CVTS should continue, and the harmonisation and adjustment of existing national surveys by Member States should be further explored in parallel.

Based on the recommendations set in the feasibility study, Cedefop launched a new multiannual project to develop and pilot an employer survey to identify skill needs in all sectors of the economy in Europe and carry out related analyses. The survey could in future provide Cedefop and other stakeholders with a source of qualitative and quantitative information on current and potential future skill needs in organisations of different sizes covering the whole economy (including non-marketed services) in EU Member States. The next workshop to discuss development work will take place in the first semester of 2010.

All documents relevant for this initiative are available online at: www.cedefop.europa.eu/skillsnet under the section 'Employers' surveys'.

COOL TO BE GREEN: SKILLS FOR GREEN JOBS

The right skills for green jobs are a pre-condition for transition to a greener economy. Today, skill gaps are already recognised as a major bottleneck in several sectors, such as renewable energy, energy and resource efficiency, building renovation, construction, environmental services and manufacturing. The adoption and promotion of clean technologies requires skills in the application, adaptation and maintenance of technology. Skills are also crucial for enabling economies and businesses, and workers and entrepreneurs to adapt rapidly to changes brought about by environmental policies or climate change.

Against this background, Cedefop, in cooperation with the ILO, is conducting applied policy research into skill needs for greener economies, and in particular into new and changing occupational profiles, greening of existing occupations and identification of

obsolescent skills and occupations. The objective of the study is to identify strategic skill development responses in selected countries worldwide. The research is based on several country studies with primary focus on examples of good practice in supplementing national policies designed to 'green' economies with skill needs identification and effective skill response strategies. Cedefop is covering country studies in six EU Member States: Denmark, Germany, Estonia, Spain, France and the UK; the ILO is conducting country studies on 15 countries: Australia, Bangladesh, Brazil, China, Costa Rica, Egypt, India, Indonesia, Mali, Philippines, South Africa, South Korea, Thailand, Uganda and the US. All studies will be conducted based on the same research methodology. Results of the work will be disseminated during a joint Cedefop-ILO event in 2010.

FUTURE SKILL NEEDS FOR THE GREEN ECONOMY

Europe set the pace in the drive to a low-carbon economy. Expansion of the green economy is being accelerated by concerns relating to energy generation, resource use and environmental management. Skills are a critical ingredient of coherent education, training, employment and environmental objectives. This publication is based on the Cedefop workshop on future skill needs for the green economy, which presented research results of several recent studies on green skills and green jobs, in Thessaloniki, on 6 and 7 October 2008. The studies show examples of emerging skill needs, the changing qualification needs in jobs for renewable energies and skill profiles in environment and eco-innovations.

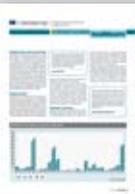
RESTRUCTURING FORUM - SECTORS' NEW SKILLS FOR NEW JOBS

The European Commission in cooperation with the European Parliament, the European Economic and Social Committee (EESC) and the Committee of the Regions is organising on 7 and 8 December 2009 a restructuring forum dedicated to sectors' new skills for new jobs. The objectives of the forum are to present, promote and discuss the recently published 18 sector-based studies that look at emerging and future skill needs up

to 2020 (<http://ec.europa.eu/social/main.jsp?catId=784&langId=en>) and to launch a discussion on how to reinforce and promote stronger cooperation at European level on skills anticipation, focusing on the sectoral approach.

More information: <http://ec.europa.eu/social/main.jsp?catId=782&langId=en&eventId=209&furtherEvents=yes>

SECTOR FLASHES



Healthcare

This new flash focuses on key trends and future skills and occupational requirements in the healthcare sector. It is based on the outcomes of the international workshop 'Future skill needs in the healthcare sector', held in May 2008 in Thessaloniki, which was organised in cooperation with the European Social Dialogue Committee in the Hospital Sector in the European Union, the European Federation of Public Service Unions (EPSU), and the European Hospital and Healthcare Employers' Association (Hospeem).



Green economy

The objective of this flash is to provide better insight into how greening the economy is affecting the job market. Trends and mechanisms of restructuring our countries towards an environmentally and socially sustainable green economy is the central theme. What sectors, occupations and skills will be required in this process? What policies do we require for creating these occupations, and developing education and training systems to support continuously changing requirements? These are the main questions discussed in the green economy sector flash.

Cedefop PUBLICATIONS

related to skill needs

Published in 2009

- **Cedefop (2009). Future skill supply in Europe. Medium-term forecast up to 2020: synthesis report** (Cedefop information series). Available in English.
- **Cedefop (2009). Future skill supply in Europe. Medium-term forecast up to 2020: key findings** (Flyer). Available in English, French, German, Greek, Italian, Spanish.
- **Cedefop (2009). Skill mismatch: identifying priorities for future research** (Cedefop working paper series, 3). Available in English.
- **Cedefop (2009). Skills for Europe's future: anticipating occupational skill needs** (Cedefop panorama series). Available in English.
- **Cedefop (2009). Future skill needs in Europe. Medium-term forecast: background technical report** (Cedefop information series). Available in English.

Coming soon ...

- **Cedefop (2010). Skills supply and demand in Europe by 2020.**

All publications and various new online papers are available at Skillsnet webpage, section 'Publications and papers'.

FORTHCOMING Cedefop EVENTS

related to skill needs

- **Launch conference on new Cedefop forecasts** (February 2010)
- **Skills for green jobs** (spring 2010)
- **Expert conference on skill supply and demand in Europe** (autumn 2010)
- **Workshop on skill needs and curricula in transport and logistics** (autumn 2010)
- **Various workshops on forecasting and enterprise surveys**

For more information, visit the Skillsnet webpage regularly, section 'Events'.

GERMAN INITIATIVE FOR EARLY IDENTIFICATION OF SKILL NEEDS

The German Federal Ministry of Education and Research (BMBF) relaunched its initiative for early identification of skill and qualification needs. The relaunched initiative was presented at a conference on 22 June 2009 in Bonn. An essential element of the initiative is still the FreQueNz network. 'Web 2.0' and 'Internet of things' (next generation of applications and devices which promise to transform the way we use and think about Internet) are the first two fields of research of the projects started in April 2009. First results are expected in spring 2010.

More information: www.frequenz.net

IDENTIFICATION OF NEW SKILLS ON THE 'SMART HOUSE'

The so-called 'smart house' or 'intelligent house' links components of home automation, such as heating systems, air conditioning, lighting, electronic devices, and multimedia to improve energy performance, economic efficiency, comfort and security. The research project on early identification of new activities and skills aims at the following fields of study: home automation, facility management, safety features and equipment, robotic services, entertainment electronics and home appliances. The German research project is being carried out by VDI TZ and isw Institute.

More information: Henriette Freikamp (Freikamp@isw-institut.de) or visit www.frequenz.net

FUTURE SKILL NEEDS IN NANOTECHNOLOGIES

Directorate G, Industrial technologies, of DG Research is launching a call for tender on 'Assessment of impacts of NMP technologies and changing industrial patterns on skills and human resources' which consists of a skill needs analysis in the NMP areas, trying to answer questions such as: what are the new and emerging skills? Is industry dealing with advanced technologies facing skill shortages? Are educational structures adapted to provide training for this new industrial environment?

The project will be based on desk research, a survey and interviews with stakeholders from industry, education and research.

More information: Sandra Peeters (Sandra.Peeters@ec.europa.eu) and Jesús Alquézar Sabadie (Jesus-Maria.Alquezar-Sabadie@ec.europa.eu)

Cedefop published in 2006 various publications on skill needs in nanotechnology (available at www.cedefop.europa.eu/skillsnet in section 'Sectors').

FINNISH PROJECT ON SKILLS NEEDS

Developing anticipation methods in Finland is one of the aims of the current government programme. At the Finnish National Board of Education (FNBE), part of the Ministry of Education, an anticipation project on future competences and skills needs has been started. The project known as VOSE is supported by the European Social Fund and will continue until 2011. The aim of the project is to create procedures for anticipating competences and skills needs for the future in post-compulsory education and in all vocational and professional fields.

More information: Ulla Taipale-Lehto (ulla.taipale-lehto@oph.fi) or Heidi Backman (heidi.backman@oph.fi) or Seija Saari (seija.saari@oph.fi) or visit www.oph.fi/projects/vose

WORLD CLASS EMPLOYMENT, SKILLS AND PRODUCTIVITY

Set up in April 2008, the UK Commission for Employment and Skills advises the four governments in the UK on how to achieve world class employment, skills and productivity. It is the centre for skills forecasts and LMI research in the UK, cooperating with European and international partners where possible. The UKCES has committed to delivering a range of activities including a series of 'working futures reports' which forecast 10-year trends in the UK labour market and to developing 'the Almanac', a compendium of UK LMI. In April 2009, it launched *Ambition 2020*, its annual report on the progress the UK is making towards being a world leader in

employment and skills by 2020. The UKCES is now beginning a major skills project in England, exploring the strategic skills needed to drive growth and create high-value jobs in the post-recession future. The work is due to be published in January 2010.

More information: www.ukces.org.uk

'INTERNET OF THINGS' IN LOGISTICS

On behalf of the Federal Ministry of Education and Research (BMBF), the ITB (Institute Technology and Education of the University of Bremen) and the Bremen Institute for Production and Logistics Ltd (BIBA) are investigating which future qualification requirements are to be expected for occupational tasks at a medium qualification level with the application 'Internet of things'. Researchers will try to forecast the changes of qualification requirements of the target groups following introduction of the new technologies. The activity focuses on two sectors: the food and the automotive industries and their processes in distribution logistics. The results will be available in spring 2010.

More information: Lars Windelband (lwindelband@uni-bremen.de)

CROSS NATIONAL SURVEY ON COMPANIES' RECRUITMENT

The study aims at discovering the relationship between the quality of a country's VET system and employers' recruitment and training practices. It is proposed that different types of educational systems lead to different forms of company-based recruitment, induction and training of novice employees. Information will be gathered through a mixture of methods in the car service and production industry sector. Four countries (Germany, Spain, Finland and the UK) are participating in this feasibility study that aims to develop an instrument for use in large-scale transnational surveys. The countries were selected to capture a wide variety of VET systems.

More information: Philipp Grollmann (Grollmann@bibb.de) or Annalisa Schnitzler (Schnitzler@bibb.de)

HOW TO BECOME A SKILLSNET MEMBER?

If you are an experienced researcher in skill needs analysis and forecasting, or are actively engaged in the transfer of research results on future skill requirements into policy and practice, you are welcome to submit the online application form on the Skillsnet website (www.cedefop.europa.eu/skillsnet).

Skills analysis team - contact details

Contact for feedback, review, ideas or contributions: skills-analysis@cedefop.europa.eu



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