

Mapping the landscape of online job vacancies

Background report: Estonia

Study: Real-time labour market information on skills requirements: Setting up the EU system for online vacancy analysis

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1.1. Preface

Over the last decades, online job portals have become important features of the job market. The Internet offers a rich source of live and real-time labour market information for almost all of occupations. It can provide insight on job-specific skills required in particular occupations in different regions, combined with information on the characteristics of the job offered – i.e. much more than is available using conventional sources. However, consistent and comparative information on the use of the internet and online job market by job-seekers and employers in Europe is rather scarce.

To tap the potential of online labour market information, Cedefop started to investigate the possibility to develop a system for gathering and analysing data from online job portals in the EU to complement the centre's toolkit of skills intelligence instruments. While this is feasible, drawing meaningful conclusions from these data requires a good understanding of the features of national online job markets. Therefore, Cedefop has mapped the landscape of the online job market in all EU Member States. This publication presents one of the background country reports developed in the project - 'Real-time labour market information on skills requirements: Setting up the EU system for online vacancy analysis' (AO/DSL/VKVET-GRUSSO/Real-time LMI 2/009/16). Its findings will inform the cross country comparison published in the upcoming synthesis report.

The work was undertaken by a consortium of external contractors: CRISP (Milano/IT), Tabulaex (Milano/IT) and IWAK (Frankfurt/DE) and their network of country experts (see annex 1 for detailed list) and closely supervised by Cedefop. It presents authors' analysis of the landscape of the online job portal market in the country using a methodology developed for the purpose of the project.

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List of Abbreviations

| | |
|----------------|--|
| Cedefop | European Centre for the Development of Vocational Training |
| ESCO | European Skills, Competences, Qualifications and Occupations |
| ESS | European Statistical System |
| EURES | European Employment Services |
| HR | Human Resources |
| ICT | Information and Communication Technology |
| OJVs | Online Job Vacancies |
| PES | Public Employment Services |
| SME | Small and Middle-sized Companies |
| VET | Vocational Education and Training |

Introduction

With the project “Real-time Labour Market Information on Skill Requirements: Setting up the EU System for Online Vacancy Analysis”, Cedefop explores online job-vacancies (OJVs) as a new source of real-time Labour Market Information. By crawling the most important online job-portals of the 28 EU Member States, Cedefop will further its understanding of the changing skills demand in different sectors and occupations. A systematic overview of the online job-portal landscape in each of the 28 EU Member States will identify the most relevant online job-portals and provide context for the data scraped from them. With the Landscaping Activity, Cedefop seeks to acquire insights into the structure of online job-portal markets and the extent to which online job-portals are used in recruitment and job-search. Furthermore, it aims to better understand which factors cause variation in the formats and content of OJVs in different countries.

This Country Report was compiled between April and October 2017 and constitutes a first overview of the online job-portal landscape in Estonia. It is based on desk research of available data sources in Estonia (e.g. public data, academic research and publications of interest groups) and expert opinions. Chapter 1 describes the methodology used for compiling the report in terms of the relevant search paths and data sources. Chapter 2 gives an overview of the main drivers for the use of online job-portals in recruitment and job-search, while Chapter 3 concentrates on the characteristics of the online job-portal market and lists the most important players. Moreover, it seeks to understand to what extent OJVs published on the online job-portals provide adequate information on the developments in the Estonian labour market in terms of the number of vacancies and representation of sectors/occupations. Furthermore, it elaborates on the legal and regulatory framework guiding the activities of the job-portal owners and employers, highlights the differences between the public versus private online job-portals and delineates their relationships with one another. Chapter 4 covers the use of online job-portals in recruitment and job-search. It focuses on the differences in the behaviour of employers and job-seekers across sectors, occupations, qualification levels and regions. Chapter 5 presents the most important online job-portals in Estonia for web-crawling and describes a step by step process of the OJV drafting and posting on select private and public online job portals. Chapter 6 concludes the Country Report by describing the main features of OJVs in Estonia in terms of format and content. In particular, it explores to what extent OJVs contain information pertaining to hard and soft skills required for the job, how these skills are characterised and what they reveal about the nature of the job.

1. Methodology

1.1. Search Paths

The desk research started with examining the websites of the Estonian Statistical Office¹ and the Estonian Unemployment Insurance Fund² containing public data and research based on it. The aim was to identify publications concerning the use of online job-vacancies in recruitment and job-search. In the second step, a broader desk research was carried out on the subject of recruiting and human resource management with an aim to explore the relevance of online job-portals and OJVs in these fields. Following search terms and their combinations were used between 2 May and 18 August:

| Search term 1 | Combined with search term 2 |
|--|--|
| Tööportaal(id) Job-portal(s) | Tööturg Labor market |
| Töökuulutus(ed) Job-vacancy (vacancies) | Tööotsing Job-search |
| Tööotsing Job-search | Personali värbamine (Personnel) recruiting |
| Personali värbamine (Personnel) recruiting | Eesti Estonia |

To access also project reports and research articles written in international context and for an international audience, the same combinations of search terms were entered in also in English. The following databases were used:

- Google;
- Google Scholar;
- The Estonian e-library database Ester³.

Furthermore, the websites of think tanks and research institutes such as Praxis⁴ and the Centre for Applied Social Sciences (CASS-RAKE)⁵ were searched for relevant data and publications. In the following, a short overview of the data sources is given.

1.2. Data Sources

1.2.1. Public Data/Academic Research

In Estonia, the use of online job-portals in recruiting and job-search or content of OJVs has not been in the focus of academic research. Official statistics on the labour market are available in the context of the European Labour Force Survey and the Estonian Job Vacancy Survey⁶. The latter

¹ Estonian “Eesti Statistikaamet”, <https://www.stat.ee/teadustood>.

² In Estonian “Eesti Töötukassa”, <https://www.tootukassa.ee/content/tootukassast/peamised-statistilised-naitajad>.

³ www.ester.ee.

⁴ Praxis: Centre for Policy Studies, in Estonian: “Poliitikauuringute Keskus”, <http://www.praxis.ee/en/our-works/>.

⁵ In Estonian “Sotsiaalteaduslike rakendusuuringute keskus (RAKE)”, <https://skytte.ut.ee/en/cass>.

⁶ In Estonian “Tööjõu liikumine, hõivatud ja vabad ametikohad”.

has been carried out by the Estonian Statistical Office since 2008 in line with the regulation of the European Parliament and Commission No. 453/2008. It gathers information on the movement of labour in enterprises in the following categories:

- The number of filled and vacant positions in companies (number of persons);
- The number of newly hired persons and the number of persons who left the company (in previous quarter);
- The number of persons whose leaving was “initiated by the employer” (in previous quarter).

It is possible to differentiate the data by year (quarter), sector and regions⁷. While the survey does not cover the search paths of companies, comparing the number of hirings and the number of job vacancies on the three dominant online job-portals helps to assess the relevance of the online job-portals for the recruitment process. In the near future, the Statistical Office intends to explore how the Job Vacancy Survey could be supplemented by analysing Big Data scraped from the three largest portals (CV-Online, CV Keskus and Töötukassa, see Section 3.2.5.) (E1).

The data provided on the website of the Estonian Unemployment Insurance Fund proved extremely useful for assessing the role of the PES in the online job-portal landscape.⁸ It offers information on vacancies posted on the PES online job-portal by:

- Vacancies by month (2003-2010):
- The job vacancies based on the ten ISCO major groups (currently available for 2003-2017);
- The field of economic activity based on the Estonian Classification of Economic Activities⁹ (2003-2010 (Q2) and 2010 (Q3)-2017);
- Vacancies by regional administrative units (county¹⁰) (2003-2017).

A further source that was recommended to us in an expert interview (E5) is the Estonian Labour Force Survey (LFS) conducted annually by the Estonian Statistical Office. It contains a question on the channel through which the respondent got their last job: “How did you get this job [in which you are currently employed]?” (question D11A).¹¹ The possible answers are:

- Contacted relatives or friends;
- Responded to job advertisements;
- Placed CV or job seeking advertisements;
- Through Töötukassa [PES];
- By starting own business/farm;
- Started working on a family farm/in a family enterprise;
- Returned to my previous job after military/alternative civilian service;
- Returned to my previous job after parental leave;
- In connection with closing down/reorganisation of the enterprise;
- (Better) job was offered, did not seek it;
- Second job became main job;
- Through an educational or training facility.

⁷ In Estonian “maakonnad”.

⁸ <https://www.tootukassa.ee/content/tootukassast/peamised-statistilised-naitajad>.

⁹ In Estonian “Eesti Majanduse Tegevusalade Klassifikaator” (EMTAK). The website of eRIK, the Centre of Registers and Information Systems, states that: “The Estonian Classification of Economic Activities (EMTAK) is the national version of the international harmonised NACE classification. EMTAK has a hierarchical structure, being divided into five levels. The first four levels conform to the NACE structure and the fifth level is the national level, established according to the specifics of the Estonian economy and the relevant legislation.” (<http://www.rik.ee/en/e-business-registry/emtak-fields-activities>).

¹⁰ In Estonian “maakond”.

¹¹ The survey questionnaires for all 28 EU Member States 2005-2017 can be found at: http://ec.europa.eu/eurostat/statistics-explained/index.php/EU_labour_force_survey_-_methodology.

It is possible to further specify the role of the PES in finding a new position: “Was Töötukassa involved at any moment in finding this job?”¹²:

- Got information about employer from there;
- Found job advertisement on the website or information board of Töötukassa;
- Töötukassa was otherwise connected to getting the job (e.g. wage subsidy, practical training i.a.);
- Got this job without assistance from Töötukassa.

It would be interesting to explore further how far the Labour Force Survey (LFS) can be used as a proxy for determining the number of vacancies published as OJVs. Furthermore, it would be possible to analyse the changes across years since time series are available (2005-2017). However, it would have to be taken into account that vacancies in sectors with severe shortages of skilled labour where job openings cannot be filled at all (neither through OJVs nor through other channels) would be underrepresented.¹³

Bachelor and Master theses exploring the recruitment behaviour of firms in case studies constituted a further source of information for the study. They offered empirical insights into different sectors: retail, wood processing (furniture and houses), hospitality, mining and agriculture. As a result, it enabled us to broaden the insights into recruitment practices as in the interviews the experts had most often referred to the ICT sector. Further theses concentrated on the expectations of job-seekers in the recruitment process (two) and on the adjectives used in OJVs (one). However, when considering the insights from these theses we need to bear in mind the limitations to the sample size as well as the level of analysis.

1.2.2. Research/Surveys of Interest Groups

Since 2010, there has been a rising interest in labour market issues such as the institutional set-up of the labour market, the availability and functionality of labour market services (e.g. career counselling), the mobility and productivity of labour as well as the matching of skills supply and demand. These topics are covered by reports commissioned by the ministries and different government agencies. Furthermore, grey literature from employers' associations focuses on labour market topics such as recruiting skilled labour from abroad, increasing the productivity of labour and skills mismatches, resulting in the scarcity of labour. Although online job-portals are not in the focus of this type of literature, it still offers first leads for understanding their use as a recruitment channel or instrument of career development. Even more importantly, this literature was used to support the analysis of the main drivers for the use of online job-portals.

Moreover, the two large online job-portals, CV Keskus and CV-Online, contain information that can be used for assessing their relevance in recruitment and job-search.

¹² Multiple answers are allowed.

¹³ A European-wide comparison of the situation is not possible, since the questions differ. In Finland, for example, this question addresses the channels of general job-search behaviour within the last four weeks (“Have you been looking for a new job or a secondary job, or been making arrangements for becoming self-employed during the past four weeks?” (TE1); “I will next list different methods of job seeking, Which of them have you used during the past four weeks, i.e. between dd/mm-dd/mm/yyyy?” (TE4)). In Latvia, the LFS has a similar focus (J'87, J'88). However, even if the question is posed in a similar manner like in Lithuania, the options for answers can be so general that they do not allow any conclusions regarding the relevance of online job-portals (e.g. „Through the Lithuanian Labour Exchange; Through a private employment agency; Other“ in the case of Lithuania).

1.2.3. Expert Opinions

Expert interviews were available with the representatives one of the two large private online job-portals (E1); the ESSnet member representing the Estonian Statistical Office (E2), a retail company (E3), a EURES advisor (E4), the Agency Kutsekoda¹⁴ of the Ministry of Education and Research (E5) and a large state-owned company (E6), a retail company (E6). As several interviews involved two to four people, we could acquire differentiated insights on the state and development of the online job-portal landscape: the respondents did not just answer to the questions, but also developed a line of argument to convince their peers.

¹⁴ In Estonian “Sihtasutus Kutsekoda”, <http://oska.kutsekoda.ee/en/>.

Table 1: Overview of the different sources used in the Landscaping Activity

| Type of source | Title/year | Provider | Information on | | | Quality |
|---|--|---|---|--|-----------------------------|--|
| | | | Share of existing vacancies on online job-portals (PES/private) | Use of OJVs per sector/occupation/qualification level/region | Skills requirements in OJVs | |
| Source 1: Public data/ academic re- search | Estonian Job Vacancy Survey | Estonian Statistical Office | No direct information, can be used for an indirect assessment | No | No | High |
| | Estonian Labour Force Survey | Estonian Statistical Office | No | No | Yes | High |
| Source 2: Research/ surveys of in- terest groups | Alas, Ruth/Eomois, Ester/Furman, Jekaterina/Kaarelson, Tõnu/Rillo, Marko/Uudelepp, Agu: Eesti juhtimisvaldkonna uuring 2015: Raport [Survey of the Estonian Management 2015: Report] | Civitta and Estonian Business School | Yes | Yes | No | Good, but only for the group of managers |
| Source 3: Expert opinions | Expert opinions 2017 | Experts 1-6 (see the References for detailed information) | Yes (not all experts) | Yes | Yes | Good, but opinions differ |

2. Labour Market Dynamics and Impact on the OJV Market

The share of low-skilled people in the Estonian labour force is strongly declining, while the share of those who have acquired a vocational or higher education is rising. 46% of the jobs require a higher education, every third employee is expected to have a vocational education.

The OSKA labour market monitoring and forecasting report of Kutsekoda identified three sectors which will face shortages of skilled labour in the future (Kutsekoda 2017):

- **Construction:** lacks mainly engineers as project or object managers. Moreover, as the technical systems of buildings are becoming more complex, there is a lack practical specialists such as heating and sewage engineers;
- **Transport, logistics and vehicle repairs:** here, the need for managers and high-level specialists with tertiary degrees will be growing. Furthermore, the logistics sector is missing practical specialists who are not educated in Estonia;
- **Agriculture and food production:** By 2024, employment in these sectors will decrease. However, this concerns mainly low-skilled labour. The number of jobs for agricultural and veterinary specialists and production technology engineers will increase. In food production, technical specialist, product developers, quality control managers, industrial engineers, maintenance technicians and mechatronic technicians will be needed.

At the end of January 2018, unemployment in Estonia was 5.2% (Töötukassa 2018). The level of unemployment has generally risen because of the administrative reform rendering employees of municipalities unemployed. The highest level of unemployment is in Ida-Virumaa (an industrial, mainly Russian-speaking region in the north-east) (9.8%) and lowest in Harjumaa where the capital city of Tallinn is located (3.8%) (Töötukassa 2018).

The main drivers supporting the use of OJVs in recruiting and job-search in Estonia are:

- **Economic recovery:** during the economic crisis that hit Estonia in 2008 and caused the unemployment to rise from 3.9% in May 2008 to 15.6% in May 2009, the job-seekers intensified their efforts and used all possible channels for looking for employment. As a result, the already stable position of online job-portals was fortified further. Due to the economic recovery, a larger share of employees make a decision to leave employment rather than being laid off. Even though 68% of the employees are open to new employment opportunities (Järva 2018 based on the study of the Estonian Salary Information Agency), the main obstacle to changing jobs are their high expectations towards their salary. The median of job-searchers' salary expectations has grown by €200 within the last year and is currently €1,400 gross (Järva 2018). The pressure on salary is highest in the sales and service occupations where the mean salary is significantly lower than the average salary in Estonia (Järva 2018). The increased labour market mobility enhances the use of online job-portals;
- **Sectoral changes:** as the Estonian ICT sector is increasingly gaining importance nationally and internationally, the employers in this sector need to intensify their recruitment efforts to secure the availability of necessary skills. Even though the word of mouth remains the dominant recruitment path in the ICT sector, the necessity to create an employer brand to attract suitable candidates drives the employers to design and publish innovative and creative OJVs. These slowly influence the standards of job advertising also in other sectors, since

job-seekers develop expectations both regarding the design of OJVs and other employers start paying more attention to presenting themselves as attractive employers and describing the job tasks in terms of benefits for the candidates. The increasing digitalisation of different sectors requires new skills sets and is reflected also in the content of OJVs;

- **High labour force participation rates:** On 1 January 2018, Estonian population was 1,319,700 (Järva 2018). Estonia has an ageing society, which displays the highest share of over-65-year-olds still active in the labour force (over 25%, OECD Data 2016). In the coming eight years, the number of working age population will decrease by 43,000 people, which will pose limits to inducing economic growth by increasing the level of employment (Järva 2018). Furthermore, Estonia already has a low share of part-time employment (8.7%) and a high employment rate (73.7% of working age population) (OECD Data 2016). As a result of the recent Employment Ability Reform¹⁵, those with a constrained working capacity are expected to find employment after being subjected to a new procedure of assessing the capability to work. The high degree of participation in the labour force across different age groups and relatively small differences between women and men (70.1% and 77.5%, OECD Data 2017Q1) is a result of low levels of pensions and salaries in European comparison. Consequently, the Estonian workforce is required to ensure their employability and use different channels for job-search, thus increasing the importance of online job-portals.

¹⁵ In Estonian “Töövõimetusreform“.

3. Context and Characteristics of the Online Job-portal Market

3.1. PES Online Job-portal(s)

3.1.1. Legal/Regulatory Framework

The activities of the Estonian Unemployment Insurance Fund are subject to different legal regulations such as the Labour Market Services and Benefits Act passed on 28 September 2005¹⁶, Civil Service Act passed on 13 June 2012¹⁷, Act for the Protection of Personal Data passed on 12 February 2003¹⁸, the Equal Treatment Act passed on 11 December 2008¹⁹ and the Employment Act passed on 17 December 2008²⁰. Moreover, according to the Language Act passed on 23 February 2011²¹, all OKVs have to be in Estonian.

Based on these legal acts, PES has to publish all jobs in the public sector on its online job-portal (E7) and can refuse to publish OJVs in which the employer is providing misleading or wrong information concerning the company or the job. Also, Töötukassa reserves the right not to publish OJVs clashing with legal acts or good practices concerning the employer's activities or the job tasks (E7).

3.1.2. Organisational Structure of the PES Online Job-portal(s)

The Estonian PES offers a wide range of labour market services such as:

- Addressing different target groups, such as the unemployed, young, elderly or disabled people;
- Providing career and redundancy advice as well as career, mobility and further education consulting;
- Providing different kinds of job opportunities for re-establishing or enhancing the employability of job-seekers;
- Providing European-wide labour market mobility services through EURES.

Töötukassa has 15 regional offices, but only one centrally administered online job-portal. Currently, the online job-portal of the Estonian PES is undergoing changes to improve the matching between the OJVs and job-seekers, thus enabling Töötukassa to improve the efficiency of its services for its different target groups. At the moment, the matching is largely based on the job, qualifications, language skills, target job and to some extent the desired salary. However, as of beginning of April 2018, ESCO competencies will be used for matching potential candidates and job offers. To that end, Töötukassa is designing a self-learning system which would suggest to employers competencies usually associated with a particular job when they are filling in the forms for posting their vacancy online.

¹⁶ In Estonian "Tööturuteenuste ja -toetuste seadus", <https://www.riigiteataja.ee/en/eli/ee/Riigikogu/act/515012018005/consolide>.

¹⁷ In Estonian „Avaliku teenistuse seadus“, <https://www.riigiteataja.ee/en/eli/530102013082/consolide>.

¹⁸ In Estonian "Isikuandmete kaitse seadus", <https://www.riigiteataja.ee/akt/748829>.

¹⁹ In Estonian "Võrdse kohtlemise seadus", <https://www.riigiteataja.ee/akt/13096445>.

²⁰ In Estonian "Töölepingu seadus", <https://www.riigiteataja.ee/akt/112072014146>.

²¹ In Estonian "Keeleseadus", <https://www.riigiteataja.ee/en/eli/506112013016/>.

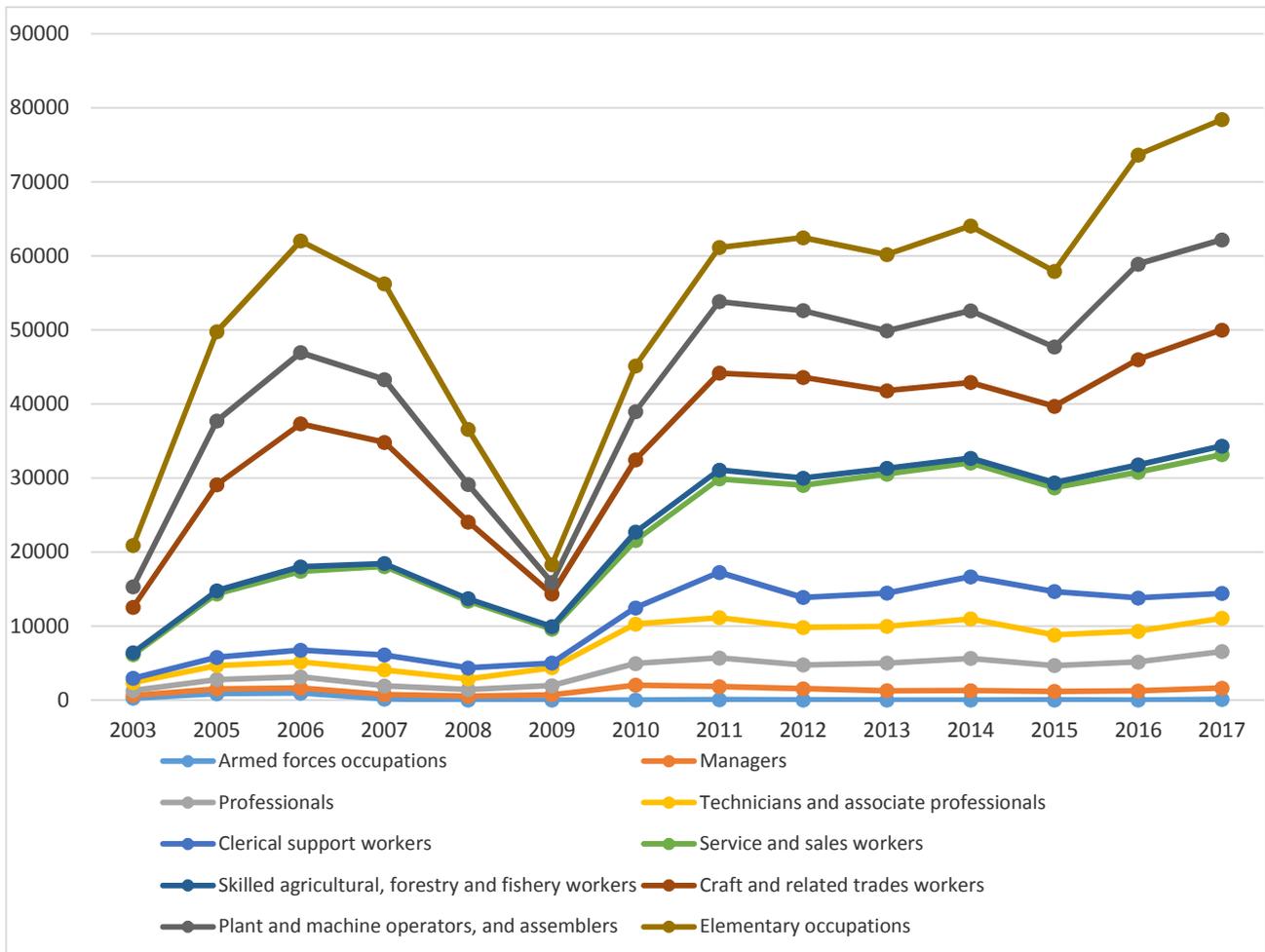
It is not necessary to be registered as an employer of job-seeker with the Estonian Töötukassa (PES) to be able to use their online services – the OJVs are visible online and the employers can use the services of the PES advisors. However, to use the e-services of the PES, it is necessary to log onto the portal by using the ID-card or a mobile-ID in order to identify oneself.

3.1.3. Focus of the PES Online Job-portal

In January 2018, 4,333 new OJVs were submitted to Töötukassa which was 58% more than in December, but 4% less than at the same time last year (Töötukassa 2018). The PES job-portal is primarily used by smaller firms who do not have a specialised personnel department and thus no experience with drawing up job advertisements. The recruitment consultants at PES are specifically trained to help these employers with the OJVs (e.g. filling in fields such as “about the employer” and “we offer”).

To a large extent, these job offers are for blue-collar workers. As demonstrated in Graph 1, OJVs for elementary occupations, plant and machine operators and assemblers as well as craft and related trades workers are the most common ones among all OJVs on the PES online job-portal. They are followed by skilled agricultural, forestry and fishery workers as well as service and sales workers. These trends are also confirmed by experts (E1, E7).

Graph 1: Number of OJVs on the Estonian PES online job-portal by occupation (ISCO major groups 1-10) (2003-2017)



Source: Statistics of Töötukassa²²

3.1.4. Outreach of the PES Online Job-portal

The estimated share of Töötukassa in the labour intermediation market is estimated at 47% (Eesti Töötukassa 2016: 34) and has been relatively stable since 2010. Traditionally, the PES has been used by smaller companies who are particularly drawn by its free of charge OJV posting services and accompanying help in drafting the OJVs (E7). Furthermore, the interviewed experts assume that unemployed specialists or persons with management experience already use other channels when looking for a job (e.g. word of mouth, private online job-portals or professional staffing firms) (E6), especially when taking into account that the number of vacancies for managers on the PES portal is extremely low. According to the Annual Report of Töötukassa (Eesti Töötukassa 2016: 34), there are 35 unemployed managers per one vacancy on its online job-portal.

However, the PES has launched several initiatives to enhance its market share and expand its sectoral scope:

- As of mid-September 2017, public sector jobs in the field of public administration, public safety and order as well as education will be added to this database on a regular basis. The representatives of the PES hope that this will make the online job-portal it more attractive also for specialists and upgrade its image to some extent (RMP 2017);
- The recruitment consultants are trained to actively explain to employers the benefits of using the online job-portal of Töötukassa (Eesti Töötukassa 2016: 34). For example, they actively contact employers who have posted a vacancy in small regional newspapers or hung up a job advertisement in a local shop (E7);
- Töötukassa is looking to sign co-operation agreements with larger employers for filling different kinds of jobs. As a result, the share of office jobs on the PES portal has increased (E7);
- Töötukassa is seeking to co-operate with private online job-portals to increase the number of its OJVs and the outreach of the OJVs posted on its online job-portal (E7).

3.1.5. Posting of PES Vacancies on EURES

Following the regulation 492/2011 of the European Commission, all jobs registered at Estonian Töötukassa are automatically uploaded to EURES. Employers can request a job not be posted to EURES (e.g. if they want the EURES advisor to send it directly to a particular country for advertising), but this is rarely the case (E4). In some cases, it is possible to bypass the Estonian PES when posting the jobs on EURES:

- A few jobs are manually posted to EURES by the Estonian EURES advisers and they are marked with a blue EURES flag;
- Employers can post jobs directly to EURES, but this number is quite low and these OJVs do not display the EURES flag. Furthermore, employers report that they would like to be able to edit their vacancies (e.g. adjust the spacing or add their logos) so that look better, but this is not possible (E4).

The template on the PES website is available in Estonian and English. Providing following information is mandatory: temporary/permanent position; full-time/part-time position; ESCO code of the position, contact details of the employer; expiration date of the OJV (E4).

²² <https://www.tootukassa.ee/content/tootukassast/peamised-statistilised-naitajad>. Graph 1 does not contain Year 2004, since figures for Q2 were missing for that year.

3.2. Private Online Job-portals

3.2.1. Legal/Regulatory Framework

The activities of private online job-portals are subject to the Act for the Protection of Personal Data, the Equal Treatment Act and the Employment Act.

At the moment, the Social Ministry is planning to re-enforce the anti-discrimination principles in the recruitment and job-seeking by prohibiting the automatic matching process used by CV Keskus and CV-Online on the basis of personal characteristics (nationality, race, skin colour, religion or beliefs, age, disability and sexual orientation). Furthermore, automatised searches based on mother tongue and personal background (gender and family background including pregnancy, birth, existence of children, familial responsibilities) are not permissible (ERR 2017a). The only data that the online job-portals should be allowed to store and process should be restricted to qualifications and work experience. The ministry justifies these changes with the ILO convention stipulating equal treatment in recruitment and job-search (ERR 2017). The Estonian Employers' Confederation²³ (Pealinn 2017) and CV Keskus (ERR 2017b) have issued statements claiming that in the current situation of labour shortages the employers do not apply discriminatory practices, as they do not have the luxury of being picky about potential candidates. Furthermore, the new regulation would increase the administrative burden of recruiting considerably. It is not clear yet to what extent the new legislation will affect the business models of the online job-portals, but considering that they offer comprehensive recruitment solutions besides providing a platform to publishing OJVs (see Section 3.2.2.), this development is to be further monitored.

3.2.2. Dominant Online job-Portals and Their Business Models

The Estonian online job-portal landscape is dominated by two private portals, which have carved up the market between them: CV Keskus and CV-Online. In the assessment of Axel Springer Media AG, Estonia has one of the most digitalised and technologically developed market along with Latvia and Lithuania (Springer 2016).

CV Keskus was set up by two Estonian entrepreneurs in 2000 as an online job-portal facilitating the matching of demand and supply in the labour market. According to our own observations, the number of OJVs published on CV Keskus is consistently slightly higher than on CV-Online. In 2004, CV Keskus expanded to Latvia and Lithuania, using the trade mark CV Market Group and established leading online job-portals cv.market.lv and cv.market.lt. In 2007, CV Keskus was bought by the HeadHunter Group offering online HR-solutions and later operating in Russia, Ukraine, Belarus, Kazakhstan and other countries. On 29 March 2017, the Baltic operations of CV Keskus were sold to Axel Springer Media AG. CV Keskus is part of the global network of online Job-portals, The Network – The World's Local Recruitment Experts.²⁴

CV-Online was established in 1996 as a recruitment company, built up its presence on the Internet in 1997 and extended its business to Latvian and Lithuanian markets in 1999.²⁵ It claims to currently hold the market leadership not only in terms of the sales turnover, but also as the forerunner of innovation in the segment of recruiting services. In 2012, CV-Online was acquired by Alma Media OYJ – one of the leading Finnish media companies listed on Helsinki stock exchange. Alma Me-

²³ In Estonian "Eesti Töandjate Keskliit", <https://www.employers.ee/>.

²⁴ <http://www.the-network.com/>. Its self-description states: "In a mission to provide recruiters with one global solution for all their international hiring needs, over the last decade The Network has grown into an affiliation of the world's leading job boards covering 130+ countries. By uniting the best local recruitment services into a convenient global solution, The Network has become a mainstay in the online recruitment market".

²⁵ The following information stems from: <https://www.cvonline.com/about-company/what-is-cvonline>.

dia's portfolio contained leading online job portals in the Baltic sea region and the Balkans: monster.fi in Finland, monsterpolska.pl in Poland, jobs.cz in the Czech Republic, profesia.sk in Slovakia, monster.hu in Hungary, mojposao.net in Croatia, posao.ba in Bosnia and Herzegovina and poslovi.infostud.com in Serbia. From January 2014, CV-Online is owned by Monster, who obtained a share in Alma Media recruitment portals. As a result, CV-Online belongs to the world biggest Internet recruitment group.

In both cases, the online job-portals are offering labour mediation services in the recruitment of specialists and managers. By operating an associated online job-portal they can enhance their visibility in the recruitment sector. Their expertise is further underlined through publishing recruitment reports based on small surveys among employers and job-seekers. Moreover, the CV Keskus and CV-Online encourage job-seekers to post their CVs on their website. The relatively extensive CV databases of potential applicants enable the teams of recruiting specialists to define customised personnel recruiting services for their clients.

The profiles of CV Keskus and CV-Online highlight further commonalities:

- They were established in Estonia and subsequently spread their operations to Latvia and Lithuania, making them the forerunners in the Baltic States;
- They are owned by leading online players opening up access not only to global recruitment markets, but also employ innovative approaches in terms of technological advances or marketing strategies;

As a result, the small online job-portal market is not just very internationalised and open to new impulses, but also has been extremely well connected to various networks through the operations of different parent companies over a long period of time. This would explain the flexibility of the online job-portals in Estonia.

3.2.3. Focus of the Private Online Job-portals

According to the interviewed experts, a larger share of OJVs on CV-Online are addressing white-collar workers on specialist or managerial level, while CV Keskus is focussing more on blue-collar workers. To some extent, this distinction is the result of the marketing strategies employed by CV-Online around 2003 where the portal was clearly addressing specialists, middle management and those with a higher level of formal education (Gross 2013: 61; cf. Asi 2012: 46). Now this differentiation is maintained indirectly (for example, CV-Online claims that over 80% of the most competitive companies in Estonia use that portal in their search for candidates²⁶), but still shapes the online job-portals' image.

However, due to the similar-sounding names of CV Keskus and CV-Online, the general public often mixes them up (E1). Heiko Gross found out that most of his 18 interviewees did not feel that the used job-portals are directed towards people with a certain professional background or contain more OJVs for this target group (2013: 60f.). Only those who had a university degree and were advanced in their professional career perceived a difference between the two online job-portals (Gross 2013: 60f.).

Some experts believed that companies used both portals for posting their OJVs, thus creating significant duplicates (E1). However, the interview with the personnel manager hints that companies (especially smaller ones) might consider posting their vacancy on an online job-portal too expensive and therefore they most probably choose one of the portals (E6). Sometimes a minor detail can decide which an online job-portal is picked over the other (e.g. the corporate design of the online job-portal) (E1).

²⁶ <https://www.cv.ee/firmast/lehe-statistika>; the statistics are based on the ranking of the Estonian companies' competitiveness.

3.2.4. Outreach of the Private Online Job-portals

All interviewed experts confirmed that CV Keskus and CV-Online are the most frequently used private online job-portals in Estonia. (E1-6). It was suggested that the number of OJVs on both job-portals could be combined with the number of OJVs on Töötukassa and the sum be compared with the number of persons entering and leaving employment delivered by the national Job Vacancy Survey. For example, in the second quarter of 2017, CV Keskus contained 19,500 OJVs, CV-Online 19,700 OJVs and Töötukassa 6,600 OJVs (in total, 35,200 OJVs). In the first quarter of 2017 (the second one will be available next year only), the surveyed employers reported that 36,824 persons had left their job and 41,874 persons were employed.²⁷ Considering that in some cases the OJVs on online job portals overlap and in some job vacancies more than one person is sought, a very rough estimate would be that 20-30% of jobs are filled through channels other than OJVs.

Both online job-portals can be found on social media: CV-Online is on Facebook, Twitter, LinkedIn, Instagram, Google+ and maintains a blog. Some of their postings have an informal character informing about the events in the team, some analyse the trends in the field of recruiting and in some cases specific OJVs are posted (both in Estonian and English). On Twitter, for example, the OJVs contain a short pitch of the company and the vacancy with a picture and a link directing the viewer to the OJV on the portal. Also CV Keskus can be found on the same channels. These strategies are used to link the online job-portals to the online recruitment channels and models that are increasingly gaining popularity in Estonia (see Section 3.2.6.).

3.2.5. Co-operation Between Public and Private Online Job-portals

Töötukassa exchanges the OJVs with the following private portals by sharing API documents (E7):

- CV-Online;
- leia.ee;
- palkamind.ee;
- goodNews.ee;
- tööd.ee;
- tööpakkumised.ee;
- lounaestlane.ee;
- work.ee;
- peak.ee;
- rahandusministeerium.ee;
- talent.ee;
- 1182.ee.

Most of these online job-portals are very small apart from CV-Online, which is one of the two major private portals in Estonia. It is possible to filter the OJVs to be included on the online job-portal, e.g. while tööd.ee only includes OJVs that contain the salary range, lounaestlane.ee publishes only OJVs for south Estonia and rahandusministeerium.ee is only responsible for jobs in the public sector. Both Töötukassa and the private online job-portals seek to enhance their visibility through increasing the number of OJVs.

The sharing means that OJVs, which have been posted for free on the Töötukassa portal are included on private online job-portals which normally charge employers for posting OJVs. To avoid

²⁷ Job Vacancy Survey of the Estonian Statistical Office, http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=PAV012&ti=T%D6%D6LE+V%D5ETUD+JA+T%D6%D6LT+LAHKUNUD+T%D6%D6TAJAD+P%D5HITEGEVUSALA+%28EMTAK+2008%29+J%C4RGI+%28KVARTALID%29&path=../Database/Majandus/12Palk_ja_toojeukulu/09Vabad_ametikohad/04Luhiajastatistika/&lang=2.

discontent, the private portals make the Töötukassa OJVs less visible or curtail some functionalities of these OJVs (E7). In the long run, Töötukassa would like to create one central portal for employers for posting their OJVs. This would require harmonising the recruitment systems which the private owners and the public sector have developed in parallel: the private online job-portals would have to commit to including the compulsory fields of the Töötukassa portal to enable the matching functionality required by the PES. This would mean abandoning the current format of pdf files used by the two dominant online job-portals, CV Keskus and CV-Online (E7).

Private online job-portals are seen as important players in the Estonian labour market and they are involved as experts in the labour market monitoring process of Töötukassa in Tallinn and the Harjumaa region (E1). The results of the occupational barometer are used in careers guidance (E1).

Furthermore, the Estonian Statistical Office is seeking to supplement its Job Vacancy Survey with data from the three most important online job-portals (CV Keskus, CV-Online and Töötukassa). Currently, the Job Vacancy Survey is based on the administrative data provided by the Tax Office and the Customs Office concerning the number of employed persons, newly hired employees in the last quarter and employees who had left the company (E2). The surveyed companies fill in information about their open positions at the time and state whether those who left the company did it on their own initiative or were laid off. However, to diminish the administrative burden of the surveyed companies and verify the information provided by the companies, the Statistical Office has made first attempts to access the customer database of the online job-portals in order to assign the OJVs to the companies in the business register (E2). CV-Online has already agreed to be involved in this process. According to the representatives of the Statistical Office, the main challenges in the process will be working out a reliable methodology for de-duplicating the data base and detecting the discrepancies between the number of OJVs and the number of job openings.²⁸

3.2.6. Role of Other Recruitment and Job-search Channels

As alternative channels for recruitment word of mouth and social media were most often mentioned by all interview partners. Especially in the ICT sector with severe shortages of skilled labour, requirements for specific skills sets and the importance of trust for employment relationships, word of mouth is the dominant recruitment path. Word of mouth is also extensively used by companies for recruiting seasonal labour or recruiting labour for remote/unpopular areas where they already know from experience that recruitment through online job-portals will not yield the expected results (E6).

Consequently, not every vacancy materialises as an OJV. Expert opinions on the share of vacancies published as OJVs on online job-portals diverged considerably even within organisations (e.g. E5): while some experts estimated that 25-30% of vacancies were published through any public recruitment channel, others considered this share to be 50-70%. However, the experts agreed that once a vacancy is published, it can be found on one of the three online job-portals. Online job-portal representatives who can compare the online job-portal landscapes in the three Baltic States, report that in Estonia the use of OJVs is considerably higher than in Lithuania or even Latvia. Especially in the case of Lithuania local newspapers are still very popular advertisement sites (E2).

Furthermore, social media plays an important role as a channel for recruitment and job-search (in particular, interview partners mentioned Facebook and LinkedIn), but they are more seen as supplementing the existing channels or as a form of employer branding rather than as exclusive search paths. That employer branding is becoming more important is demonstrated by the fact that Postimees, one of the two largest daily national newspapers introduced a section for job ads again

²⁸ This concerns the private online job-portals as they are allowed to re-post the OJVs published on the PES online job-portal also on their online job-portals. Furthermore, the PES online job-portal contains information on whether the vacancy contains one or more job openings.

due to customer requests (E1). Also Eesti Ekspress, a weekly newspaper, has a section for prestigious vacancies (E1). However, in the newspaper ads the job-seeker is directed to an online job-portal for more information and for submitting their application. Furthermore, some state-owned companies or ministries are obliged to publish their vacancies also in newspapers (E1).

3.2.7. Expected Trends in the Online Job-portal Market

There is first evidence that social media is becoming more important in connection with employer branding (E1, E3, E4) and most of the employers post their OJVs also on their Facebook site besides the company website (see Section 4.3.).

Other online job-portals have entered the market in the past years such as www.kandideeri.ee and www.tood.ee, but they are nowhere near contesting the leading position of CV Keskus and CV-Online. A further portal is mentioned in the context of an increasing flexibilisation of work: www.goworkabit.ee offers opportunities to those who are looking for a job for a shorter period of time (Rembel 2014: 48, E5). Even though the importance of temporary and flexible work forms is expected to grow in the coming years (Ostavel et al. 2017), the majority of Estonian workforce is still employed in full time (see Chapter 2) and this job-portal will probably remain a niche phenomenon.

4. Use of OJVs in Recruitment and Job Search

4.1. Use of OJVs in the Recruitment of Labour

In Estonia, there is no statistical database that would offer comprehensive insights into the use of OJVs in the recruitment across sectors, occupations or qualification levels of the positions that companies are trying to fill. Therefore, we can only present research that covers very specific aspects of OJV use. Despite supplementing the desk research with expert opinions, the picture that emerges remains highly fragmented:

- The PES online job-portal Töötukassa is used for service and sales jobs (E1) and very seldom in the recruitment of managers (E6) or executives (Alas et al. 2015: 46f.);
- Positions requiring a higher skills level require broader recruitment. Newspapers can be used, when searching for higher level positions such as specialists or management or in the case when many persons are needed (e.g. for a whole supermarket) (Asi 2012: 46).
- In the case of executive managers, labour market intermediaries (e.g. personnel search firms) are used (Rästa 2013: 51f.);
- OJVs are more often used for middle management and specialists (E6, cf. Rästa 2013: 50f.);
- Internal recruitment is used in cases where employers are looking for blue-collar workers (cf. Rästa 2013: 50). Internal recruitment is an important channel also in service jobs (Rembel 2104: 46) and runs parallel to external recruitment;
- In production work, OJVs may be designed to attract many candidates so that the employers can choose between them (Rästa 2013: 52);
- Companies combine different recruitment channels such as company web-page, internal website, newspapers, online job-portals and company's Facebook site, word of mouth (Goldberg 2017: 21f. for mining, E6 for a large state-owned company).

However, a recurring survey²⁹ offers first insights into the recruitment paths in executive search (Alas et al. 2015: 15ff.). It shows that the following channels are used most frequently³⁰: internal recruitment (used by 63% of firms), OJVs on job-portals (59%), OJVs on company homepage (51%), newspapers (46%), recommendations (i.e. word of mouth) (43%) and personnel search firms (44%) (Alas et al. 2015: 45f.). Compared to the results from year 2010, more companies claim to use these recruitment paths in executive search³¹, indicating that Estonian companies are more actively combining different search paths than before (Alas et al. 2015: 45f.). It is interesting to note that the same survey points out the main differences between Estonian and Finnish companies: while 46% of Finnish companies claim to use the services of Public Employment Services in executive search, only 5% of Estonian companies claim to use this channel (Alas et al. 2015: 46f). Also, Finnish companies use the company homepage considerably more often for posting OJVs in executive search (80% in Finland vs. 51% in Estonia), but use less social media (27% in Estonia vs. 19% in Finland) and online job-portals (59% of companies in Estonia and 48% of companies in Finland) (Alas et al. 2015: 45f.). This comparison highlights the importance of private online job-portals for executive search in Estonia.

²⁹ The survey was conducted among 356 Estonian companies and 182 Finnish companies in 2010 and 2015.

³⁰ Multiple answers were possible.

³¹ Only personnel search firms are more seldom involved in the search process than before (47% in 2010 compared to 44% in 2015).

In the expert interviews, references to the ICT sector were frequent. It was considered to be a particularly innovative sector, which is at the same time grappling with shortages of skilled labour (E1, E6). As a result, it uses different methods in recruitment and retention, which were considered to be challenging the traditional recruitment paths. While the percentage of persons working in the ICT sector is not extremely high, its extremely high visibility in the Estonian and international media, positive connotations as forerunners and innovators make the recruitment practices a good practice against which employers in other sectors are measured (E1, E2, E6)

The level of salaries is driven by international companies located in Estonia, which work for the international market. Even though they do not compete with local companies for contracts, they still compete for the same labour force (Jürgenson et al. 2013: 76). In the telecommunications sub-sector the labour turnover is slightly less and salaries between companies are lower (competition takes place in Estonia and not many go abroad). Practices of poaching workers are not rare, but persons are also looking for new opportunities and more exciting jobs. There are many young people employed in the sector who are especially mobile. At the same time, there are several start-up companies doing a lot for the retention of their workers, because labour is scarce and offering opportunities for further development is important (Jürgenson et al. 2013: 76). Small companies are more disadvantaged in the recruiting process, since they cannot profit from a well-known brand name. Apparently, OJVs and databases are used for finding suitable applicants (Jürgenson et al. 2013: 76f.), but mainly candidates are found through contacts or co-operation with universities.

In sectors with high turnover of labour, experts have noticed the existence of generic and permanent OJVs on online job-portals, e.g. by large supermarkets (E1, E2). Furthermore, several ICT companies are ready to recruit at any point in time if a suitable candidate should come along since finding them is so difficult. Therefore, some companies also maintain permanent OJVs in portals since recruiting has to be continuous (Jürgenson et al. 2013: 77). This is in companies who act on long-term plans (one to two years). However, there are also companies who are reticent to employ someone without concrete assignments, they would rather re-organise the work among the existing persons (Jürgenson et al. 2013: 77). Apart from this, no further evidence of permanently “live” OJVs exists.

The representatives of the PES and private online job-portals confirmed that job-portals are not used for large-scale recruitment for working abroad (E1, E7). The building sector is a notable exception where recruitment companies search for 10-20 persons at a time for working in Finland (on 21 February 2018, there were 19 OJVs on the PES online job-portal with a total 143 job-openings) (E7). Apparently, recruitment for working abroad takes place mainly through recruitment firms (E7).

The expert opinions on the differences between the use of OJVs in rural and urban regions differed: while some of them thought that word of mouth or advertisements the notice-boards in local shops were the main recruitment channels in rural areas (E1, E2, E6), others reckoned that the sparse population and general shortages of qualified labour would drive the employers towards posting the vacancy on online job-portals (E5). However, all of the interviewed persons agreed that most of the OJVs are posted for the capital Tallinn and Tartu, the second-largest city in Estonia.

4.2. Use of OJVs in Job-search

The use of different channels can be assessed based on the Internet-based survey conducted by the Salary Information Agency³² among 13,396 employees who were found among the users of CV

³² In Estonian “Palgainfo Agentuur”. It is “an independent Estonian survey agency that offers employers and employees the most up-to-date salary information about the Estonian market. [...] The Agency gathers its

Keskus and the Salary Information Agency's database (Otstavel 2016: 37).³³ Further stakeholders such as the job-portal GoWorkaBit, the Association of Education Workers, the Student's Association and Trade Union Association had helped to disseminate the questionnaire.³⁴ Among those who were actively looking for a job or were open to job offers even though were not actively looking for a job, 43% claimed to use CV Keskus, 19% CV-Online and only 5% the PES online job-portal Töötukassa (Otstavel 2016: 37). The bias towards CV Keskus as the main search channel and the extremely low share of the PES online job-portal can be explained with the use of CV Keskus for activating the respondents and the high share of employed persons in the sample. Only in 2% of the cases the respondents said that they used other job-portals (Otstavel 2016: 37). Further sources confirm the importance of CV Keskus and CV-Online as the most important portals (Asi 2012: 45).

Other job-search channels in the study of the Salary Information Agency were used significantly less often than the online job-portals: job ads in newspapers (5%), social media such as Facebook, LinkedIn (3%), direct contacts to companies (3%), and company homepages and social media accounts (2%) remained single figures. The importance of personnel recruitment companies, job fairs and temporary staffing agencies were used in less than 2% of the cases (Otstavel 2016: 37). Only word of mouth (21%) can take it up with the online job-portals (Otstavel 2016: 37).

Job-seekers change their search strategies if they prove inefficient or do not deliver the expected results. The ten young people at the age 19-24 years interviewed by Jane Gornischeff (2013) used the most-known private online job portals as well as the PES online job-portal as a starting point of their job-search. However, after a longer search period, those in the sample who had a lower educational level started using alternative paths enabling them to establish a personal contact with the employer. The reasoning behind the change of strategy was that an ad in a forum/classified ad portal has a lower threshold for contacting the employer and it was possible to demonstrate their high level of motivation and present themselves in a favourable light straight away (Gornischeff 2013: 50).

In a more recent interview, the experts (E5) suggested that the number of OJVs could be assessed through analysing the data from the Estonian Labour Force Survey, which captures through which channels the respondents found their last job (see Section 1.2.1. for the relevant questions). As the terms for accessing the LFS database need to be assessed first, the use of this data as a proxy needs to be explored further.

4.3. Expected Trends in the Use of OJVs in Recruitment and Job-search

It is expected that the use of Facebook and LinkedIn for recruitment will continue increasing in the coming years (E1, E5, E6). This concerns the trend for companies to post OJVs also on their Facebook site (E1), but also the tendency to use social media for disseminating information about job opportunities (e.g. sharing an OJV found on the company website or Facebook site, E6). Especially LinkedIn seems to have gained importance as a professional networking platform in the past

salary data through biannual surveys of Estonian employers and employees, and analyses it in the context of national and international statistics" (<https://www.palgainfo.ee/en/>).

³³ In the following, data from Otstavel (2016) is used, since the survey results are subject to charges.

³⁴ 83% of the respondents were employed. Only 23% of the respondents said that they were not looking for a job and were not interested in offers. 16% of the respondents were actively looking for a job via different channels and 61% said that they were open to offers, even though were not actively looking for a job (Otstavel 2016: 35).

couple of years (cf. Rembel 2014: 47). The Estonian PES is working towards consolidating of the online job-portal market to make recruitment easier for employers and increase the matching (E7).

5. Identifying Online Job-portals for Web-crawling

5.1. Documentation of the Job-portal Research Process

5.1.1. Identifying the Online Job-portals Through Google Search

Relevant job-portals were identified through Google searches and through recommendations from our experts. To identify relevant job-portals through Google, we used the following search terms on 23 May 2017:

Table 2: Grid for documenting the Google search for job-portals

| Search terms | | Number of results |
|---------------|---------------------|-------------------|
| Estonian | English translation | |
| “Tööportaal” | Job-portal | 170,000 |
| “Töökuulutus” | Job advert | 225,000 |
| “Otsin tööd” | Looking for a job | 6,190,000 |

Source: IWAK.

As each search term returned an extremely high number of results, we limited our review to the first five pages of results as we assumed that most employers and job-seekers would likely focus their recruiting and searching efforts on top results as well. There were no paid advertisements among the search results. CV Keskus, CV-Online and the PES online job-portal were always among the results on the three first pages (either as job-portals or with specific OJVs). However, there were some differences across the search terms: while the term “tööportaal” (“job-portal”) yielded mainly results for CV Keskus, in the results for “töökuulutus” (“job-ad”) and “otsin tööd” (“looking for a job”) CV-Online and the PES online job-portal figured more strongly. They contained 19,500 OJVs, 19,700 and 6,000 OJVs, respectively. Further portals listed among the search results were Kuldne Börs and soov.ee and leia.ee (classified ads portals), containing considerably less OJVs (300, 2,200 and 2,000, respectively). Furthermore, www.tööd.ee was identified as potentially relevant, but the number of OJVs was not visible. The search showed that both in terms of visibility and number of OJVs the online job-portal landscape is dominated by the three players mentioned above.

5.1.2. Identifying the Online Job-portals Through Expert Interviews

In all the reviewed studies and surveys CV-Online, CV Keskus and the PES job-portal were reported to be the most important online job-portals in the Estonian online job-portal landscape. This assessment was supported by all expert interviews. If the studies (e.g. the Bachelor and Master theses) had also mentioned other online job-portals such as www.goworkabit.ee, the interviewed experts mentioned only the three dominant ones.

5.1.3. Validating the Selection of Online Job-portals

Due to the transparency of the Estonian online job-portal landscape and the concurrence of the assessments resulting from the literature research, Google research and expert opinions, further validation was not considered necessary.

5.2. Conditions for Drafting and Posting OJVs in the Selected Job-portals

5.2.1. Drafting and Posting an OJV on the PES Online Job-portal

To post an OJV on the PES portal, the company representative needs to register through the electronic system using their ID card. Furthermore, the company representative needs to evidence their connection with the company by providing the company register code. Based on this, the employment relationship with the company is confirmed and the company representative can act on its behalf.

The OJV contains following information:

- **Employer's contact details:** name; address; business register code; description of the company;
- **Details on the vacant position:** job title; working time (full-time/part-time); number of vacant positions; salary/wages; starting time; location;
- **Description of the job:** job tasks; "we offer";
- **Requirements for the candidate:** level of qualification; field of qualification; required work experience; other requirements (free text); language skills; further information; required application documents.

Providing following information is mandatory: temporary/permanent position; full-time/part-time position; ESCO code of the position, contact details of the employer; expiration date of the vacancy.

The employer can choose if the vacancy is published as a publicly available vacancy (OJV on the online job-portal and on the notice boards in PES offices). The employers are informed that this OJV can be used also by other online job-portals and information portals as well as newspapers published classified ads. As a result of the matching process, employees who match the requirements, receive an email from the PES motivating them to apply for the job.

However, the employer can opt for a pre-selection process in which the vacancy is sent only to those unemployed persons matching the requirements. If there are several open positions or the employer is looking for someone with a very specific skills set, employers receive a list of unemployed persons from the database who have agreed to the PES sending their contact details to be sent to potential employers.

5.2.2. Drafting and Posting an OJV on a Private Online Job-portal

On CV-Online, it is necessary to register with the portal to be able to start filling in the form for posting an OJV. On the contrary, on CV Keskus the forms were easily accessible. Posting an OJV takes place in the following steps:

- **Step 1: Providing information for a basic OJV:**
 - Registration number of the Business Registry, name, address and phone number of the company (mandatory) + description and logo of the company (optional);
 - Occupation (drop-down menu + free text; mandatory);

- Description of the job (free text; optional)
- Requirements for the applicant (free text; optional);
- Sector/occupational field (drop-down menu (Estonia and foreign countries), mandatory);
- Location (drop-down menu; mandatory);
- Gross salary per month/hour (range; optional);
- **Step 2: Providing information for a more extensive OJV (optional):**
 - Description of the company and logo, contact person, web-page (optional) (possible to tick a box requesting to hide the name and contact details of the company);
 - Language of the ad (Estonian, English, Russian; mandatory);
 - Nature of the job (list: e.g. internship, seasonal, temporary, permanent; mandatory);
 - Part-time/full-time (list; mandatory);
 - Additional information (list: e.g. suitable for a student/disabled person, shift work; optional);
 - Notification about new candidates (e.g. CV of each candidate to my email address, summary at the end of the day; mandatory);
 - Additional information (textual; optional);
 - Choice of template (two options; mandatory);
 - Questions (defined fields for five questions; optional).
- **Step 3: Increasing the visibility of the OJV (optional):**
 - Buying gold stars to place the OJV higher up in the ranking of OJVs and render it more visible (optional);
 - Special price for publishing the OJV in a newspaper (10-15% reduction, pre-defined choices, e.g. Eesti Päevaleht, Eesti Ekspress, Postimees, Äripäev, Linnaleht Tallinn) (choice of ad size and date; optional);
 - Adding up to five pictures and/or a video to the OJV.

As the pricing model of CV Keskus is not available, we will describe the different options available on CV-Online. It is possible to choose between two models:

- The basic model (OJV published for 30 days, on average 1437 views) for €199 + VAT;
- The premium model (OJV published for 30 days, premium listing for seven days, email to the target group, sharing in the social media: €369 + VAT.

It is possible to choose between other options to do with the visibility of the OJV, consulting services of the marketing team (E1) and access to the CV database of possible applicants. As these options are manifold, the website advises the employers to seek advice from the sales team who would help them to identify the optimal recruitment strategy using this channel.

The pricing model of CV-Online has not changed recently. However, large employers who use the services of the portal more often can negotiate more favourable conditions for posting OJVs which can include over 50% discount (E6). As the sharing of OJVs with Töötukassa suggests (see Section 3.2.5), private online job-portals are prepared to relinquish their profits to a certain extent in exchange for enhanced visibility by including OJVs on their job-portal that the employers did not pay for when posting them on the PES job-portal.

6. Format and Content of OJVs

6.1. Legal/Regulatory Framework

The content of OJVs is in particular regulated by the Equal Treatment Act³⁵, issued on 11 December 2008 and Gender Equality Act³⁶, issued on 7 April 2004 (E1). As a result, some requirements cannot be explicitly mentioned (e.g. if a company is specifically looking for a man or a representative of a certain nationality) (Rembel 2014: 34, Kütt 2015: 40).

There is no law regulating the language of the OJVs, while vacancies in newspapers have to be translated into Estonian. Moreover, it is legitimate to request that the applicant submitted their CV in English or Russian, while it is prohibited in Latvia (E1).

6.2. Format of OJVs

On the two private online job-portals there's a trend towards designing more attractive OJVs that would address a larger audience. While in Estonia and Latvia skills shortages are widespread, the employers try harder to create an appealing OJV. In Lithuania, by contrast the OJVs display simpler and/or formats pre-defined by the online job-portals (E1). As the online job-portals see themselves as recruitment service providers, they also offer solutions for attracting more viewers: employers can use the services of a designer (associated cost: usually €100 in addition to the cost of posting an OJV) or can participate in weekly marketing seminars how to design the OJVs so that they are more visible and attractive for potential candidates and help the company to reach the right target group for their vacancy (E1).

In most OJVs Estonian is used as the main language. According to a representative of a private online job-portal (E1), 90% of OJVs are published in Estonian and as the PES portal has to abide by the Language Act (see Section 3.1.1.), all the OJVs have to be in Estonian there. On private portals, however, there are (rare) cases in which Estonian and Russian are mixed (see Figure 1): while the information on the job is in both languages, the job position and the job description are solely in Russian.

³⁵ In Estonian “Võrdse kohtlemise seadus“, <https://www.riigiteataja.ee/akt/13096445>.

³⁶ In Estonian “Soolise võrdõiguslikkuse seadus“, <https://www.riigiteataja.ee/akt/738642>.

Figure 1: Example of a mixed language OJV

CVKESKUS.ee Самый популярный портал по трудоустройству в Эстонии <https://www.cvkeskus.ee/509164>

Salvestan Saadan sõbrale Kõnnumised/Vastused Prindin Jaga

Тööpakkumine aegub 14 päeva pärast.

Диспетчер
BONGO OÜ [Soovin kandideerida](#)
Tööpakkumise number 509164

Описание работы
Oskame meie kollektiivi klienditeenindajate tasemele valdkonnas.
Graafik: Päev, öö, kaks puhkepäeva. Kuu on umbes 15 vahetust.
Soovil on ka lisa vahetused, mis kestavad 6 tundi, nädalavahetustel öösel.
Vahetus on üheksast üheksani.
Kandidaadil eeldame eesti- ja venekeele oskust, ning kiire trükkimine aruüles.
Lisa kõnnumised kirjutage postkasti või helistage numbrile +3725559952 +37256215857
Kontor asub kesklinna juures, madara tanaval

BONGO OÜ
Посмотреть полный профиль фирмы

Предлагаем работу диспетчеру.
График: День, ночь, два выходных. В месяц в среднем 15 смен. Так же есть возможность брать дополнительные смены в выходные дни, ночью (по 6 часов).
На данный момент смена идет с девяти до девяти.
Требование к кандидату: знание эстонского и русского обязательно, английский желательный.
Также приветствуется умение быстро печатать.
Все дополнительные вопросы пишите по электронной почте или звоните по номеру +3725559952 +37256215857
Контора находится возле центра города на улице Madara

Информация о работе

| | |
|---------------------|------------------------------|
| Место: | Таллинн |
| Вид работы: | полная занятость, постоянная |
| Окончание конкурса: | 17. detsember 2017 |
| Добавлено: | 4. detsember 2017 |
| Брутто-зарплата: | От 4.00 до 5.00 EUR в час |

[Soovin kandideerida](#) [Soovin kandideerida](#)

Source: CV Keskus on 4 December 2017.

Usually, OJVs contain no information on salary (neither exact salary nor salary range) (E1). As a result, the employer brand is taken as a proxy for a decent salary: more visible and established employers are expected to be offering a higher salary (Kütt 2015: 40f.).

6.3. Content of OJVs

Most of the interviewed experts reported that OJVs in Estonia are heavy on text, containing a long list of requirements that were not essential for the job (most notably language skills, E1, E5, E6). The OJVs are rather conservative and entail seldom creative or playful elements, especially in the case of unskilled or low-skilled workers (E1). For specialists, the requirements are worded in a very precise manner (E1, E6). However, the shortages of skilled labour lead to a more frequent use of play on words to make the OJV more attractive and create a picture of the company as a place where open-minded people are working (cf. Rembel 2014: 34). Furthermore, employers are aware that they need to reduce their expectations to attract any significant number of candidates (e.g. in terms of qualification level or language skills) (E6, E7, Rembel 2014: 35). The PES is aware of the issue and its new development of the matching tool makes the effects of including certain requirements in the OJV visible: when the employers are defining certain requirements for the job-seekers, a window will show how by including/excluding a certain requirement (e.g. a language skill) the number of candidates is diminished/increased. For every requirement that can be defined, fields have been included explaining the effects of including this information (e.g. a logo or presentation of the company). The PES hopes that this indicator will enhance the awareness of employers for the recruitment process (E7) and help them to design more attractive OJVs.

There are sectors, which have a continuous need for labour and are not afraid to use different OJV formats combined with alternative recruitment paths. In this context, experts mentioned the banking sector (e.g. Swedbank) (E1, E6) where employers consider carefully which candidates they would like to attract and employ creative formats to capture their interest, such as videos or a Fa-

cebook game. As the ICT sector has highly competitive salaries and excellent job opportunities, a lot of their recruiting activities takes place through co-operations with universities or word of mouth. However, they need to be present also on online job-portals to ensure the visibility of their employer brand. Therefore, their OJVs are less designed for finding candidates for specific vacancies, but rather for demonstrating that the work environment in their company is inspiring, innovative and competitive. As a result, the OJVs contain a lot of information on the offices, benefit schemes and career advancement opportunities (E1). Often the media is involved in the recruitment process to disseminate these images and messages.

The adjectives, which are most often used, are those, which facilitate working in teams or in service jobs: cheerful, open, friendly or those which ensure the precise fulfilling of tasks, such as responsible and precise (E1, E5). The stereotypical requirements related to personality traits are: cheerful, friendly and able to work in a team. The most frequently used stereotypical adjectives are open-minded and cheerful team. Information about the salary is not included in OJVs in most cases. Instead, the stereotypical expression “competitive salary” is used (E1, E5). Furthermore, the terms “leader” and “leadership” are used in inflationary manner, flattering those who apply for sales positions³⁷ in which they are expected to display self-management skills (E1).

In the ICT sector it has been noted that the job profiles are changing. As companies are working less on external servers, the computers used are of high quality and are not repaired should they break, the expectations for IT support are changing, resulting in less scarcity of skilled labour in the fields of IT infrastructure and maintenance. In contrast, persons who have their primary expertise in different fields (e.g. medicine and banking) and are able to supplement it with high-level ICT skills are increasingly needed (Praxis 2013: 81). This means that following soft skills are gaining importance: communication (team- and customer-oriented), leadership and problem-solving abilities, but also competencies that have to do with personal values such as ability to learn, flexibility, openness and versatility (Praxis 2013: 81). This is confirmed by Jürgenson et al. (2013: 80) who assert that sales skills, social networking, project management (communication and organisational skills) and analytical skills are gaining importance.

6.4. Main Differences Between the Public and Private Online Job-portals

As mentioned in Section 3.1.3. the PES job-portal is primarily used by smaller firms who do not have a specialised personnel department and thus no experience with drawing up job advertisements. Consequently, the OJVs were very structured due to the pre-defined fields that the employers had to fill in, but lacked elaborate details that would attract the right candidates or make them attractive as employers. Therefore, for two years PES has been working on extending the content of their OJVs through (E7):

- Making the text fields “Job tasks” and “We offer” compulsory and training the recruitment consultants for assisting the employers with filling in these fields;
- The recruitment consultants have started filling the field “Information on the employer” based on the website of the employer;
- Designing information boxes guiding the process of posting an OJV, e.g. explaining the importance of including employer logos and information about the firm;
- Helping employers to developing an OJV from scratch based on the analysis of the nature of the job and the candidates they would like to attract (e.g. not copy-pasting catch-phrases

³⁷ E.g. in Estonian “müügijuht”.

- like “friendly team” and “great career opportunities” from other OJVs just because they sound good – they might be inappropriate for the advertised job);
- Urging the employers to find a balance between the job requirements and the perks and benefits offered to the employer.

6.5. Expected Trends in the Format and Content of OJVs

Employers are expected to concentrate more on employer branding to support their recruitment activities in times of shortages of skilled labour (E2, E6, E7). Here, the recruitment strategies of the ICT sector will figure as a good practice example inspiring also other sectors to adopt a more creative approach towards designing OJVs.

Social media such as LinkedIn will become more important in recruitment (E1, E6, E7) and employers will combine different channels to spread the OJV in a best possible way (e.g. when posting an OJV on their website, creating the possibility to share the OJV directly in social media). In the coming years, video recruitment is expected to increase: rather than posting traditional OJVs, employers will post short videos presenting their companies and will expect job-seekers to send them a video instead of a CV and letter of application (E7). The informalisation of the content of OJVs and the increasing use of marketing techniques in recruitment is seen to mirror the trend of growing informal (or gig) economy currently increasing in importance (E7). Furthermore, recruiting practices will need to take into account that the patterns of working are changing: sabbaticals or work sharing will become more popular and employers will need to consider how they can cater for these needs and communicate to the job-seekers that flexible working modes are available to them (E1).

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| No. | Name of organisation | Type of organisation | Expert's position | Interview date |
|-----|-----------------------------|---|--|-------------------|
| E1 | Private online job-portal | One of the two largest private online job-portals | Executive Director and Marketing Manager | 31 May 2017 |
| E2 | Estonian Statistical Office | ESSnet Member representing Estonia | Four analysts | 12 July 2017 |
| E3 | Retail company | Private employer | Marketing Director | 13 July 2017 |
| E4 | Eesti Töötukassa | PES | EURES consultant | 13 September 2017 |
| E5 | Kutsekoda | VET agency of the Ministry of Education | Two analysts | 24 November 2017 |
| E6 | Transport company | Large state-owned company | Personnel Manager | 27 November 2017 |
| E7 | Eesti Töötukassa | PES | Analyst | 21 February 2018 |

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