

Labour market

Green economy, digitalisation, gender equality and skills in vocational training and orientation - a specific insight on trends.



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Labour market in

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Labour market in Europe

Green economy, digitalisation, gender equality and skills in vocational training and orientation - a specific insight on trends.



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Labour market developments

Labour Market Trends in Europe

Expected labour force growth/decline from 2025 to 2035 per year (% annual rate)

- EU-27 and NM: 0,2% growth per year

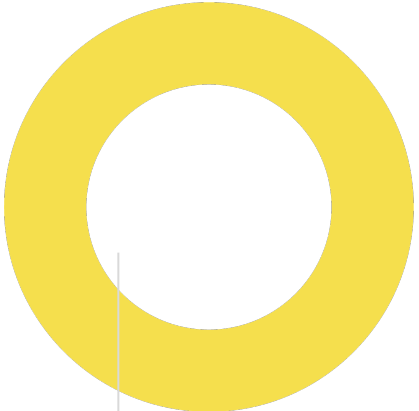
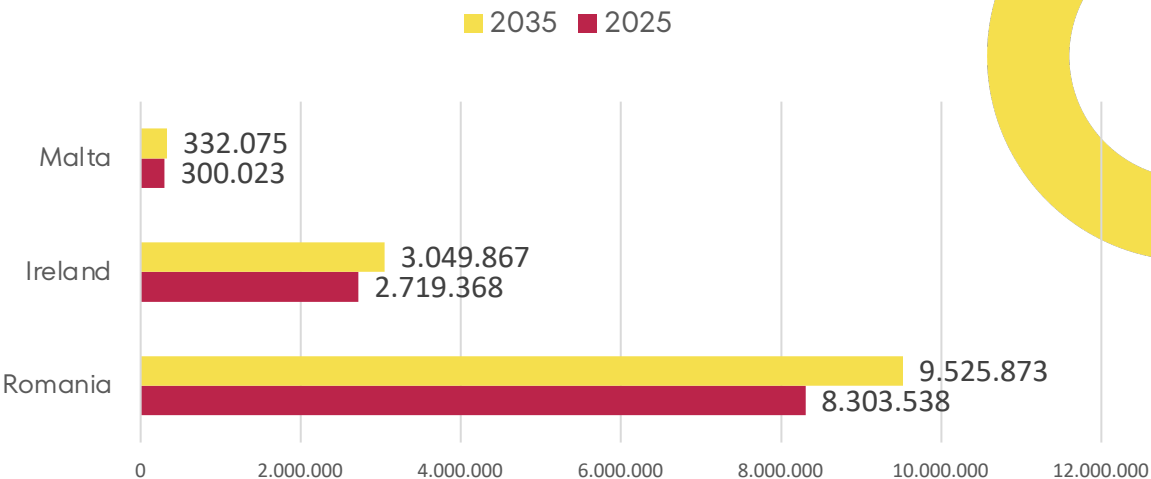
Biggest growth

- Malta 1% per year
- Ireland 1.2%
- Romania 1,4%

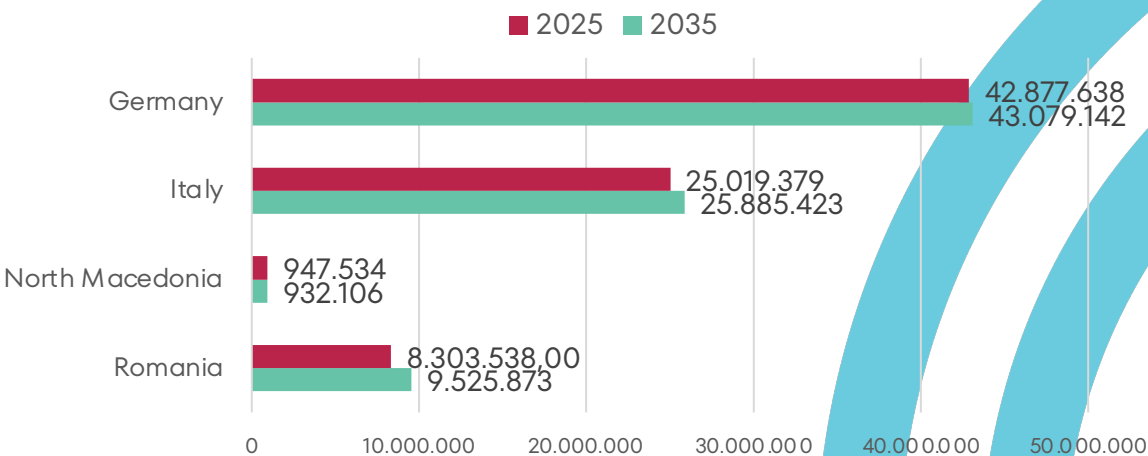
Consortium partners:

- Germany 0%
- Italy + 0,3%
- North Macedonia - 0,2%
- Romania 1,4%

Biggest labour force growth in EU



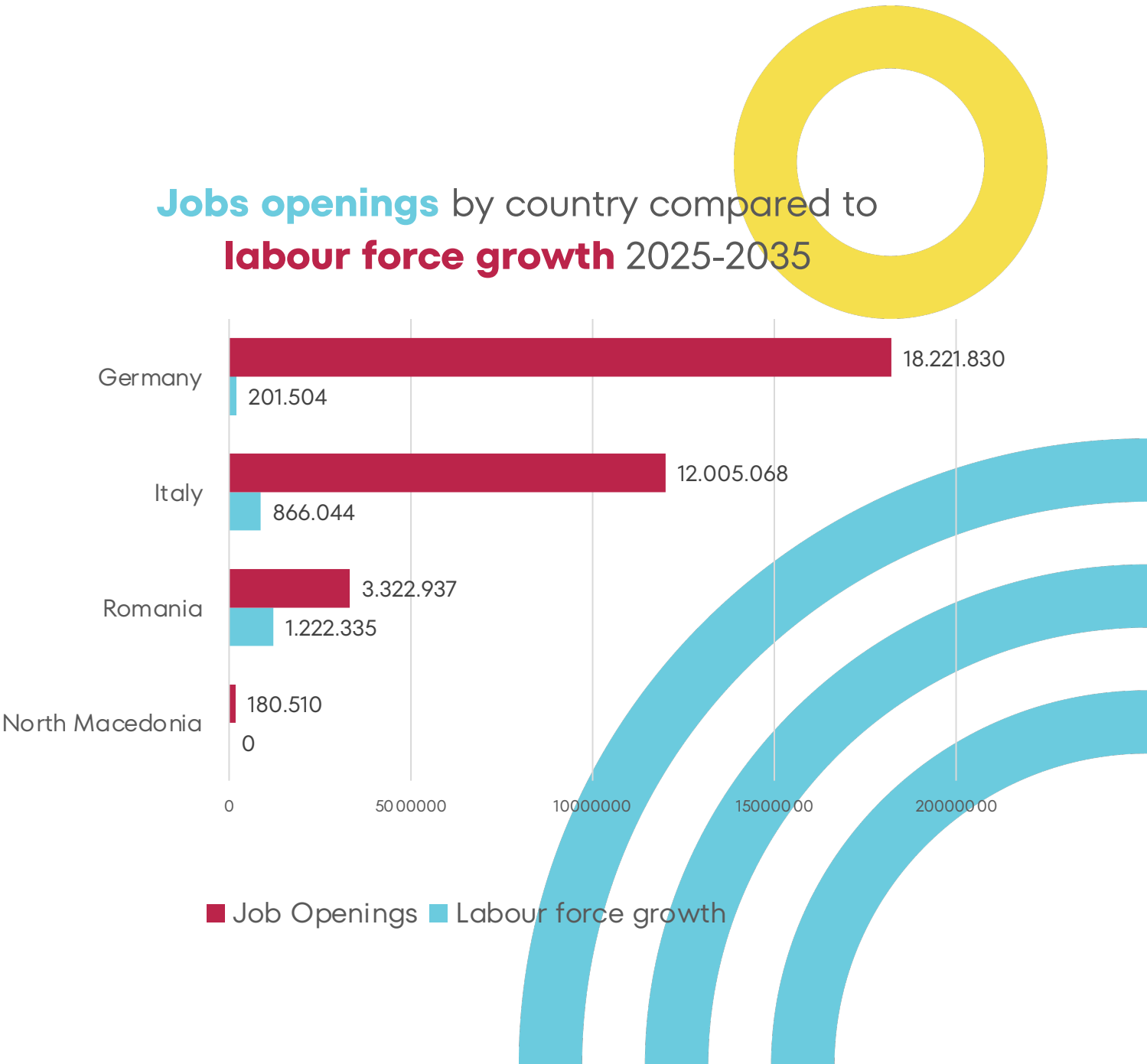
Labour force growth (Consortium)



Labour Market Trends in Europe

Comparison of labour force and job openings in total numbers shows that there is much more jobs than labour force which will lead to a **gap in skilled workers.**

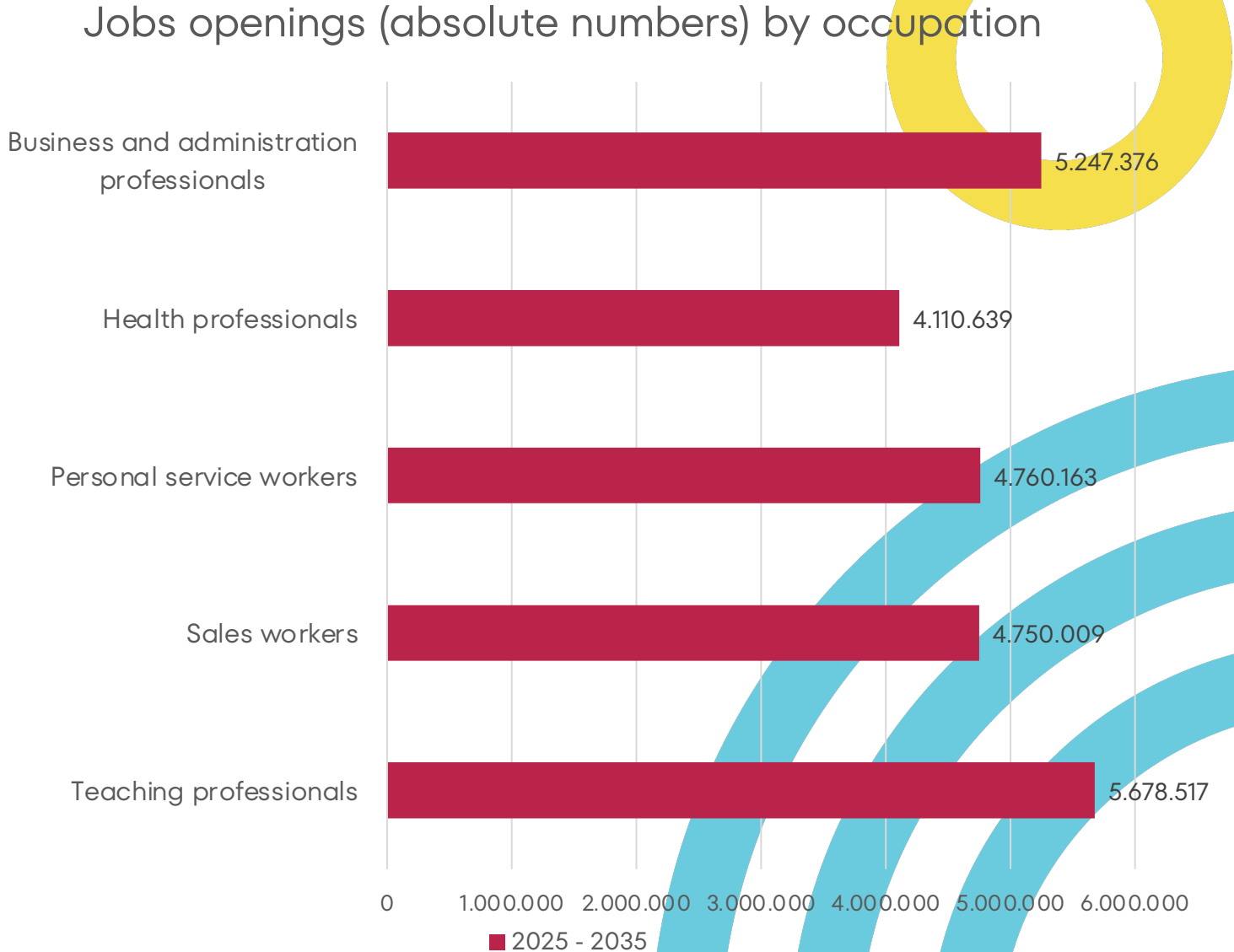
Reasons for shortage of workers: ageing society, new jobs, later entry into work, increase of part-time jobs.



Labour Market Trends in Europe

Forecast of Job openings for EU 27+NM

In which field are most job openings expected in the next ten years?



Labour Market Trends in Europe

Core skills

Skills needed to perform well in key, stable roles within the company (share of organizations surveyed)

■ Skills, knowledge and abilities ■ Attitudes

	25%	12%	15%	25%	11%
	REGION			GLOBAL	
Cognitive skills	25%			26%	
Engagement skills	6%			6%	
Management skills	12%			12%	
Physical abilities	3%			3%	
Technology skills	15%			16%	
Ethics	3%			3%	
Self-efficacy	25%			23%	
Working with others	11%			11%	

Skills Outlook: What skills will be needed in the future?

Employers estimate that 44% of workers' skills will be disrupted in the next five years:

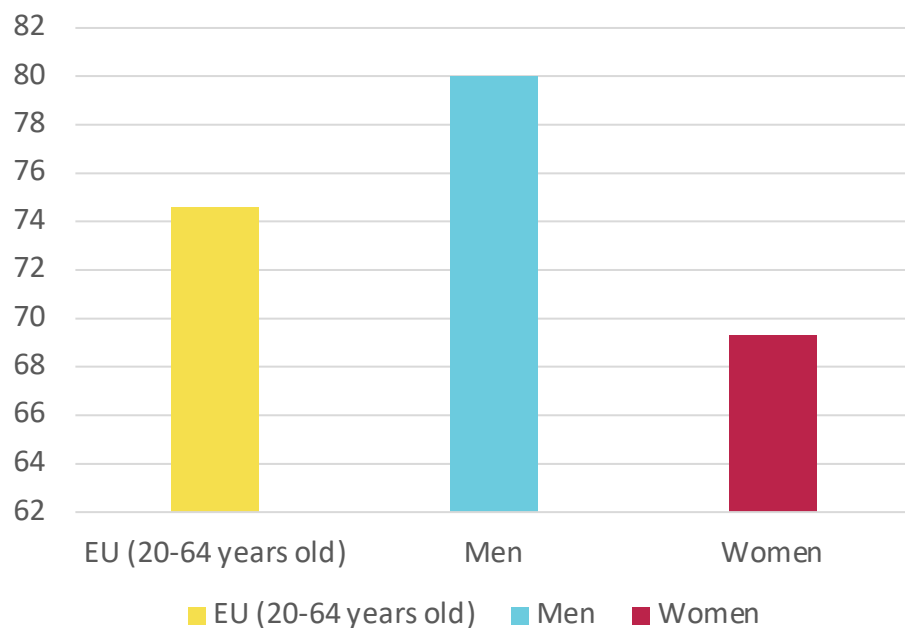
Cognitive skills are reported to be growing in importance most quickly as for the increasing importance of complex problem-solving in the workplace

Creative thinking, analytical thinking, technology literacy, self-efficacy, curiosity and lifelong learning; resilience, flexibility and agility; motivation and self-awareness

AI and big data, talent management, service orientation and customer service

Gender Equality

Employment rate 2022



○ In **all EU Member States**, the **employment rate of men is higher than those of women**.

○ In 2022, the EU employment rate for men stood at 80.0 %, while it was at 69.3 % for women, resulting in a gender employment **gap** of 10.7 percentage points.

○ **Biggest gender employment gap in Italy** (74.7% employed men and 55.0% employed women) and **Greece** (76.9% employed men and 55.9% employed women)

○ **Smallest gender employment gap in Lithuania** (79.4% employed men and 78.6% employed women) and **Finland** (79.0% employed men and 77.8% employed women)

Digitalisation in the European Labour Market

Today, **54% of Europeans have at least basic digital skills** with stark differences among countries:

Netherlands and Finland rank highest with 79% of people with at least basic digital skills in 2021.

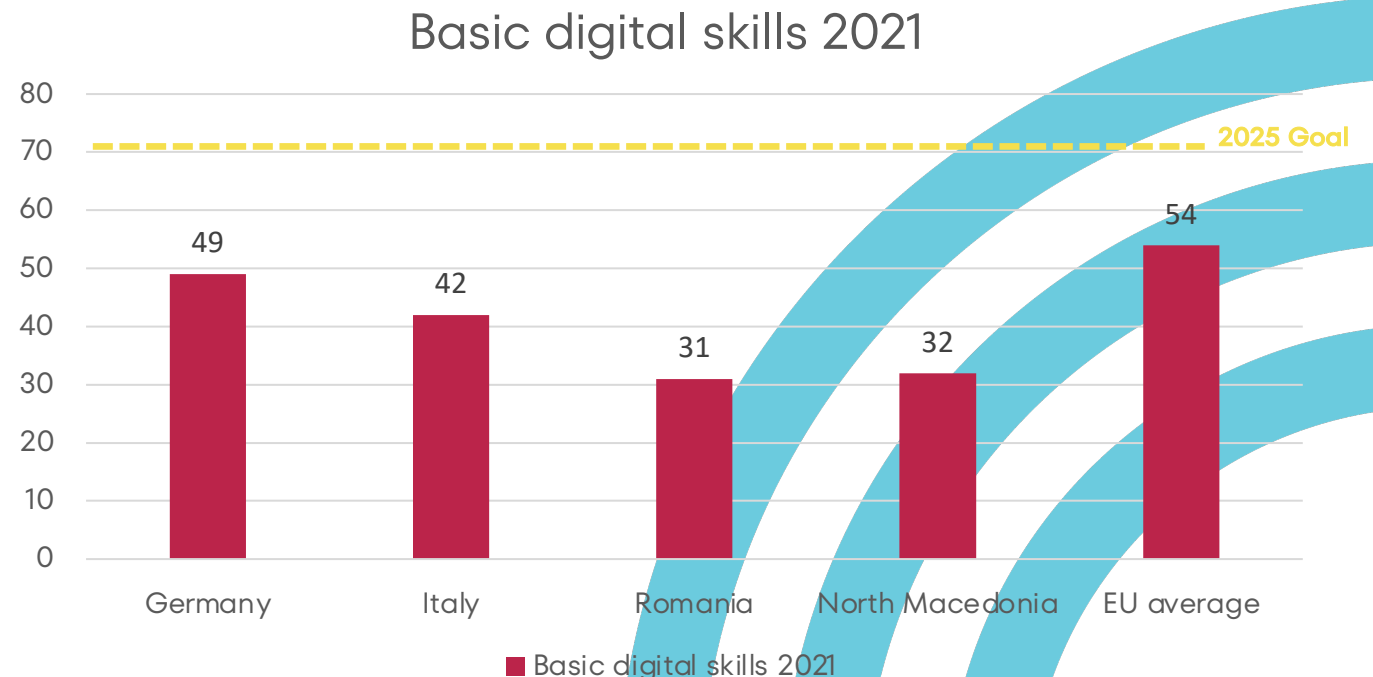
In eight Member States the rate of digital literacy is lower than 50%: Romania, Italy, Bulgaria and Poland

➔ **Digital skills gap**

Goal for 2025: **ensure that 70%** of adults have basic digital skills (European skills agenda and the digital education action plan)

In the next five years, AI and Machine Learning Specialists top the list of fast-growing jobs.

Most of the fastest growing roles on the list are technology-related roles.



Green Economy in Europe



On an EU level, employers have increased green job hiring rates since 2019. This has resulted in sustainability jobs making up **three of the top ten fastest growing roles** on the LinkedIn platform over the last four years, including **Sustainability Analysts, Sustainability Specialists, and Sustainability Managers.**

In demand green jobs 2023: Renewable energy engineer, civil engineer, scientists, fisheries manager, tree surgeon, product designer

Employment in the EU-28's environmental economy rose from **2.8 million full-time equivalents (FTEs) in 2000** to **4.5 million full-time equivalents in 2016**

EU Green Deal:

reducing emission by 55% by 2030
and become **climate neutral by 2050**



Twin transition



Ideally **green and digital transitions reinforce each other.**
Examples: Virtual reality can optimise traffic flows, reduce jams and emissions

Factors for a successful twin transition:

- societal commitment
- making the twin transition fair and inclusive (subsidies for making the transitions affordable)
- privacy concerns have to be addressed (more data)
- technological infrastructure (broadband internet)
- awareness raising and high environmental standard
- EU should be first-mover in lasting green-digital standards

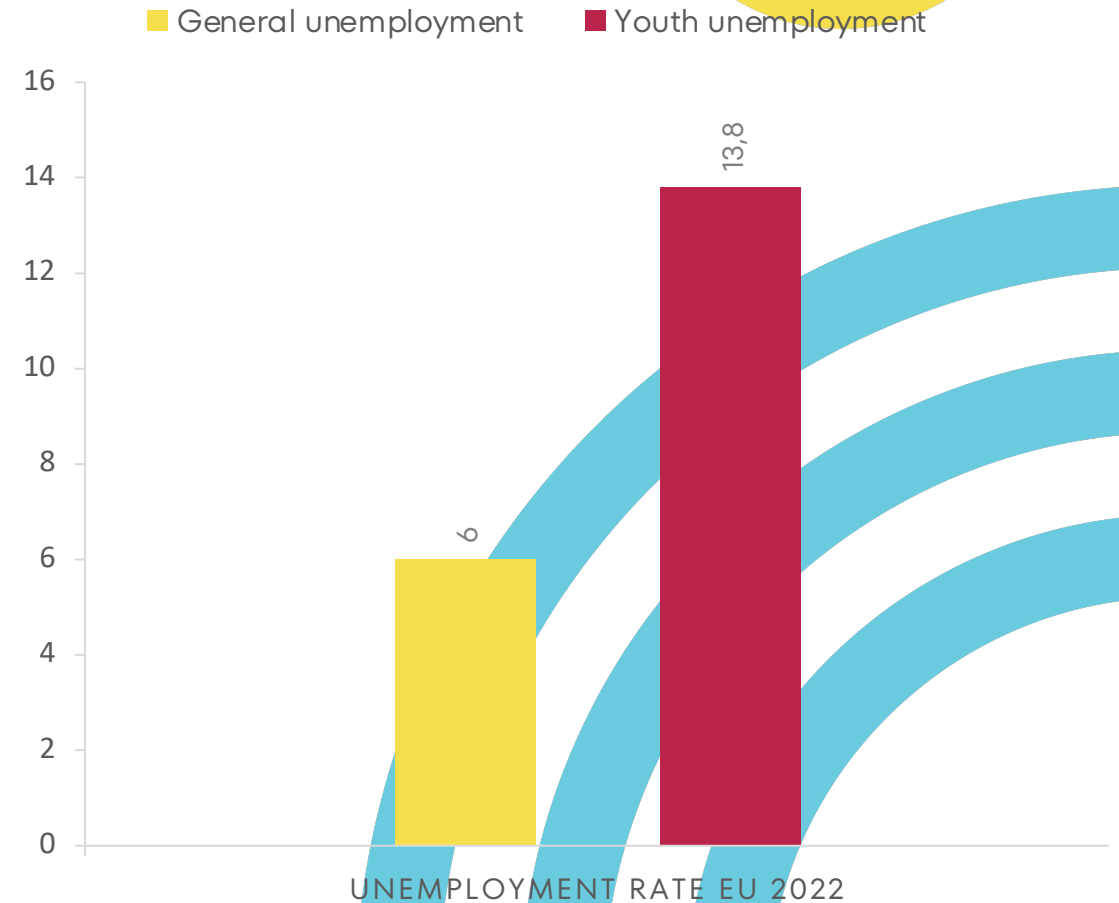


Situation of young people and career choice behaviour

Situation of young people

- The youth unemployment rate at the moment is around **13.8%** in the EU but there are noticeable differences between the different countries (Eurostat 2022). While the youth unemployment rate is lower in economically stronger Member States, it reaches over 30% in several southern European countries (Eurofound 2018).
- Youth unemployment is more than twice as high as general unemployment and young people are **disproportionately affected by economic downturns than other age groups** (ILO 2020).
- EU has a general unemployment rate of 6.0% (Eurostat, 2022) which shows that the situation for **young people on the labour market is much more precarious than for other cohorts**.
- NEET rates vary from 7% in Germany to 36% in North Macedonia

UNEMPLOYMENT RATE EU 2022



Young people's career choice behaviour



Which are factors that determine young people's career choices?

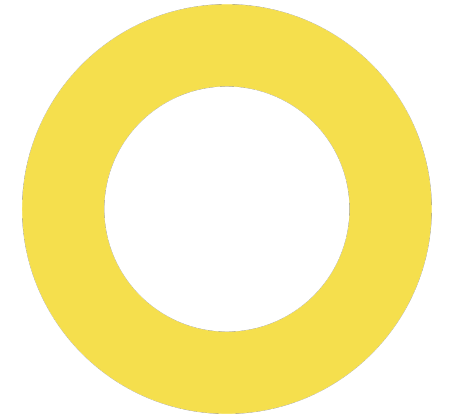
- Personal interests and passions
- Family and cultural influences
- Role models and mentors
- Educational background and training
- Socioeconomic status
- Work-life balance and lifestyle preferences
- Future job demand and salary expectations





Good practices of vocational orientation

Good practice examples of vocational orientation



Individualised approach: The vocational orientation and career guidance should be human centered, tailored to the individual needs and goals of the person seeking career guidance.

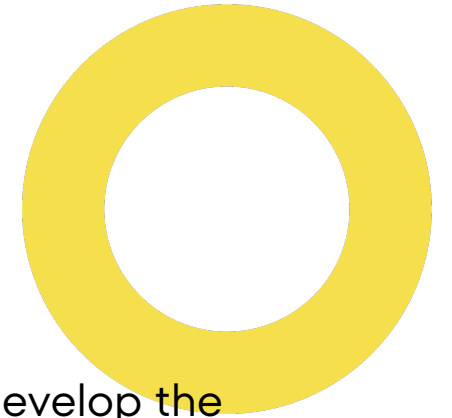
Comprehensive assessment: Career guidance should include comprehensive assessments of the individual's interests, skills, values, and personality traits to identify potential career paths.

Providing information: Career guidance professionals should provide accurate and up-to-date information on the job market, education and training opportunities, future trends, as well as other career-related resources.

Collaboration: Collaboration with other professionals such as employers, educators, and counselors help in identifying and providing better career guidance and training

Early initiation and continuous support: Career guidance should not be a one-time event but rather an ongoing process where individuals are provided early on with regular support and follow-up assistance.

Good practice examples of vocational orientation



Empowerment: Vocational orientation and career guidance should help individuals to develop the necessary skills and confidence to pursue their career goals and make informed career-related decisions.

Diversity and inclusivity: Career guidance professionals should be aware of and sensitive to the diverse backgrounds, needs, and cultures of individuals seeking career guidance.

Practical experiences: Internships, work-shadowing, field trips etc. are essential learning experiences and orientation for career pathways

New narrative around skills: Including both formal and informal learning, soft skills and transversal skills, as well as life-long learning become more important

Civic dimension: Vocational orientation should strengthen the young people's skills and choice capabilities for the labour market, but also for society, encouraging social cohesion and active participation.

→ **Concrete examples from Europe:** StartNet projects such as [Skills for Life](#) or [Go4STEM](#)

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- Slide 12: [What drives young people's career ambitions? - Skills Development Scotland](https://www.skillsdevelopment.scot.nhs.uk/what-drives-young-peoples-career-ambitions/)

Thank you.



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Labour market in Germany

Green economy, digitalisation, gender equality
and skills in vocational training and orientation
- a country specific insight on trends.



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Labour market developments

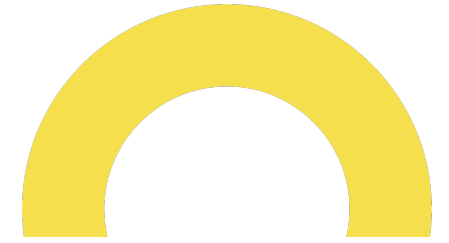


General trends in labour markets



- Low unemployment rate in Germany: 2,9 % (EU average 5,9 %)
- Since 2006 increasing number of employees in Germany (2022: 46 billion working persons)
- Low wage sector (12,5 €/hr) has big share of 19 % (6. in EU)
- Lack of (skilled) workers a big topic. Reasons are:
 - demographic effect that the boomer generation is retiring
 - More part time employees
 - Later entry into work
 - Certain branches have a lack of interest (handicraft jobs)
- Immigration of work force is **bureaucratically very difficult**
- Aging population ➡ Every second person is older than 45 years

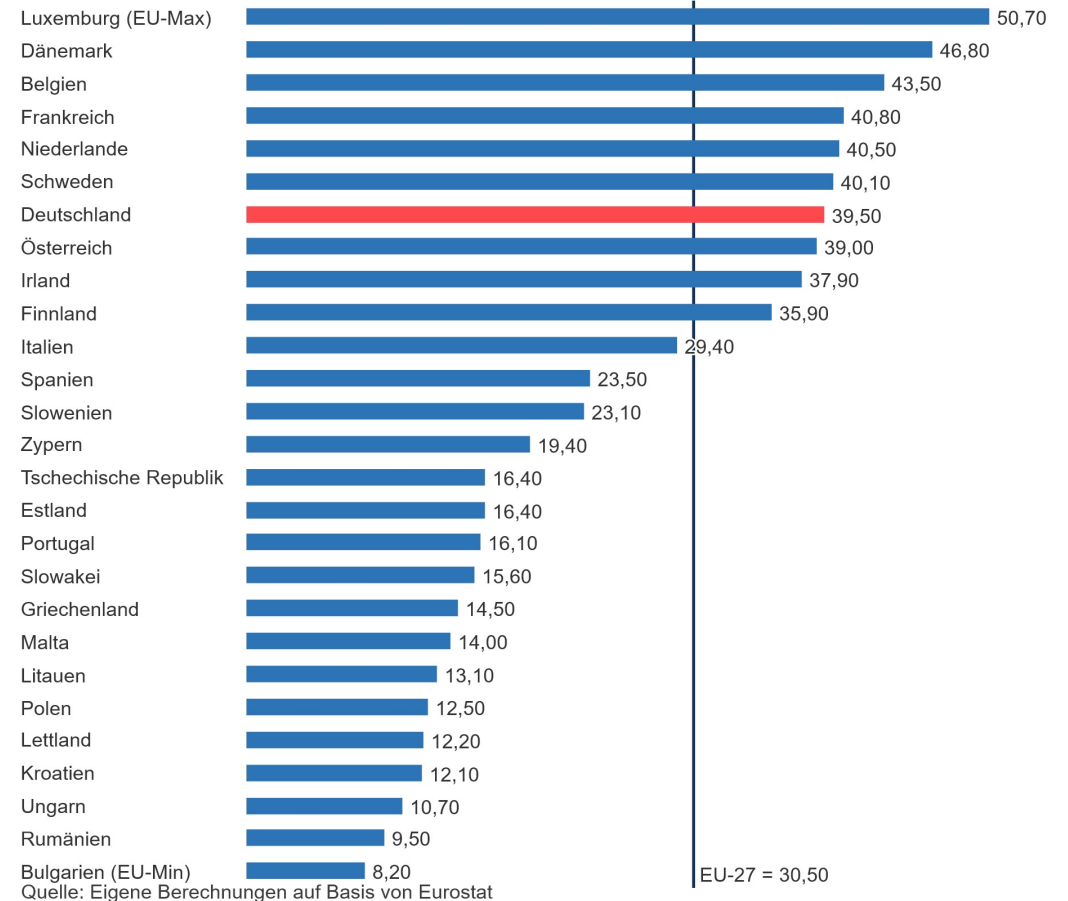
Wage structure: Average cost of labour



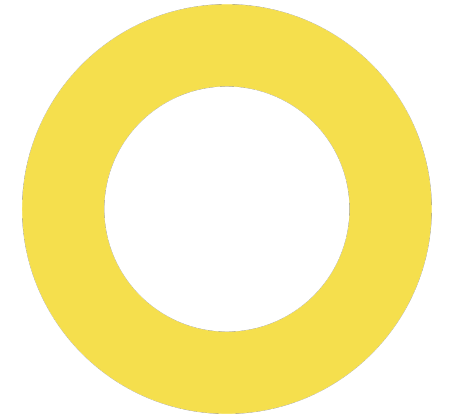
- Average cost per hour 39,50€ (incl. taxes and social security)
 - Social security systems and taxes are funded by labour costs, i.e.
 - Unemployment insurance
 - Pension insurance
 - Health insurance
 - Wage tax
- High percentage of the labour costs is redistributed
- Structural dependency of social systems to a high level of employment

EU-Vergleich der Arbeitskosten je geleistete Stunde 2022

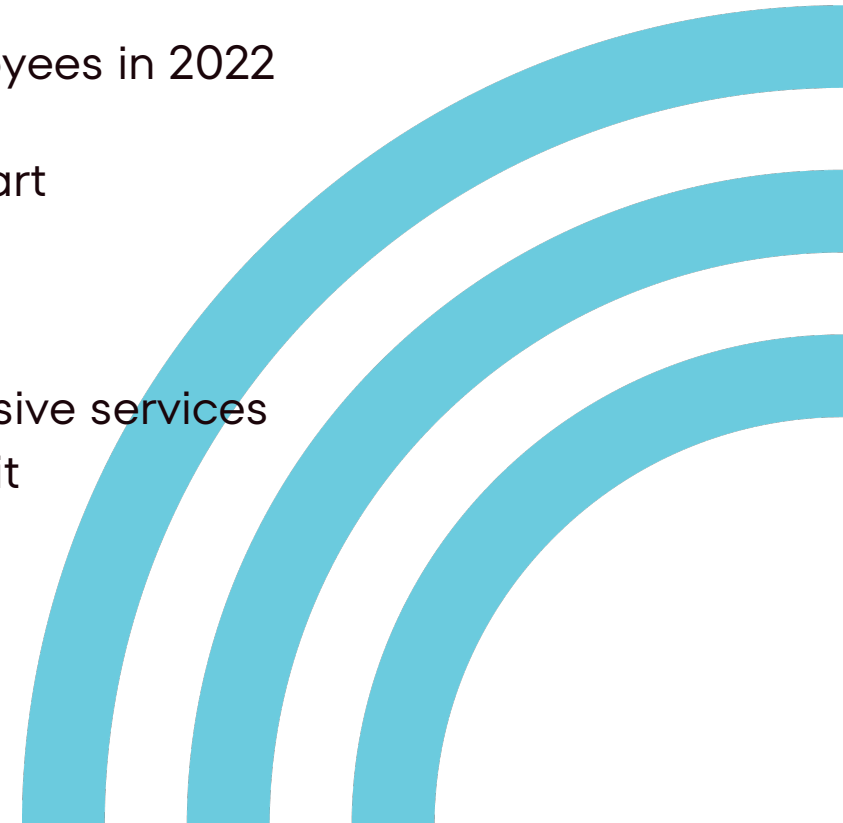
im Produzierenden Gewerbe und Dienstleistungsbereich (ohne WZ O) in EUR



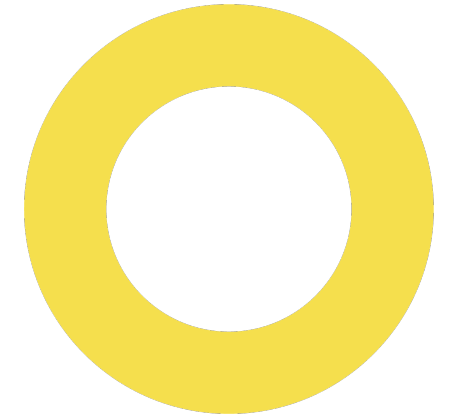
Regional disparities



- East-west disparities: gap between eastern (former GDR) and Western Germany
 - gap of 13,000 Euro in annual gross salary of full-time employees in 2022 (West: 58.085 Euro, Ost 2022: 45.070 Euro)
 - low wage sector: 23% in the eastern part, 18% in western part
- urban-rural disparities
 - More well-paid jobs and high-skilled workers in cities
 - In rural regions focus on industry and less knowledge-intensive services
 - Home office option and expensive cities could shift this a bit

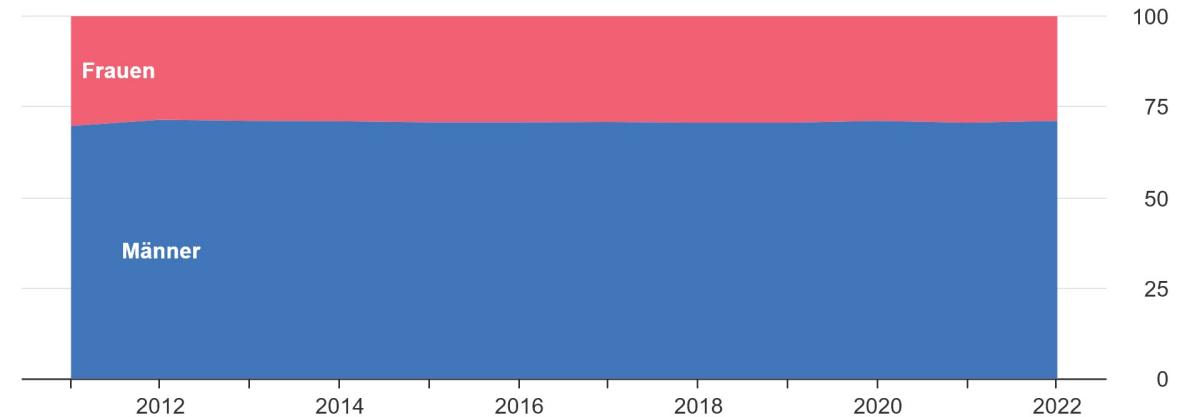


Gender Equality in the labour market



- Only **every third** of the **executive personnel** is female (28,9% in 2022) and there is little improvement in this (only 0,3% more than 2012)
- There is only a little gap in the **employment rate** (80% male, 73% female), but the part time rate is much higher for female workers (13% male, 49% female)
 - The part-time quota of women in Germany is one of the highest in the world
- **Low wage sector**: female 23%, male 16%

Anteil der Erwerbstätigen in Führungspositionen nach Geschlecht
in %

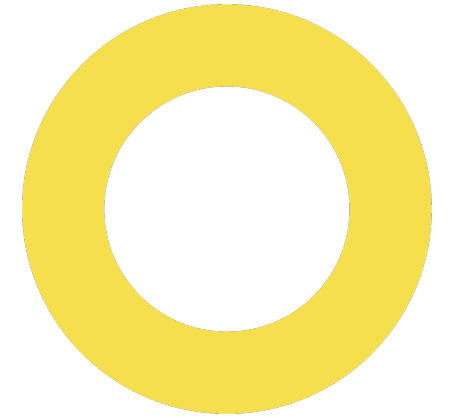


Seit 2020 eingeschränkte Vergleichbarkeit aufgrund Neuregelung des Mikrozensus.
2022: Arbeitskräfteerhebung Erstergebnis.

© Statistisches Bundesamt (Destatis), 2023



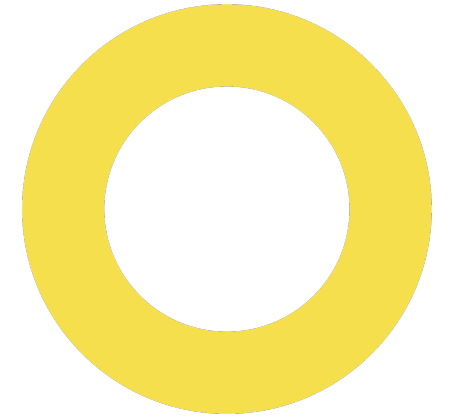
Digital transformation



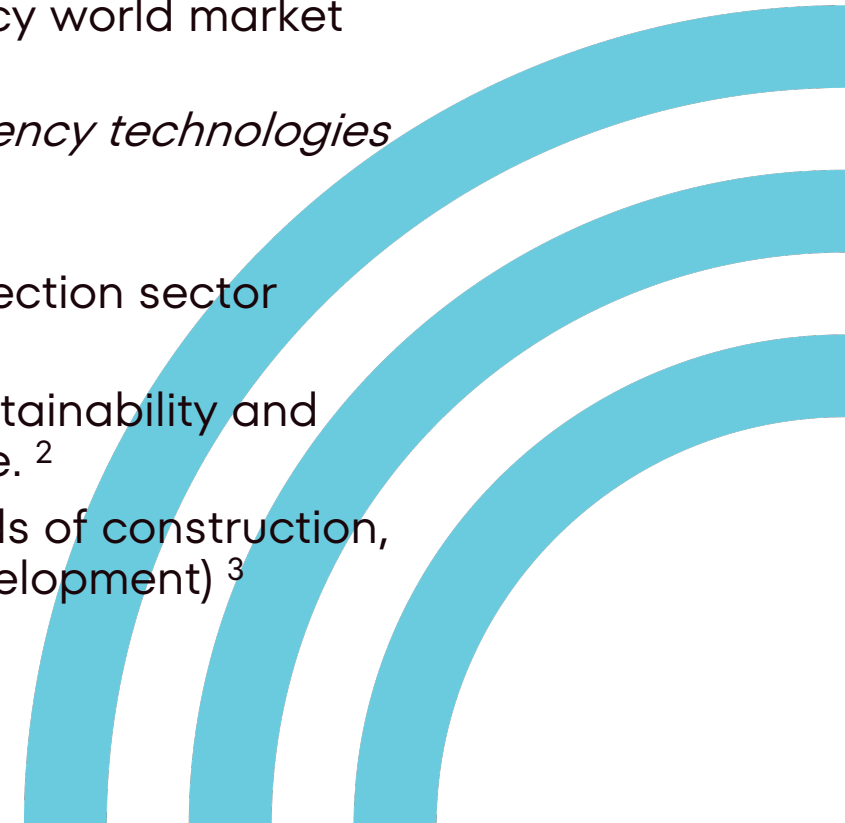
- The **necessity of the double transformation** is undisputed in economic circles and among the population at large
- Digital transformation is the **top issue of labour market policy**
- **growing shortage** of skilled workers is slowing the creation of employment
- **population has the least digital skills** in Europe (together with Spain/Italy), especially older people and women
 - Digitalization involves many **risks of discrimination**



Green transformation



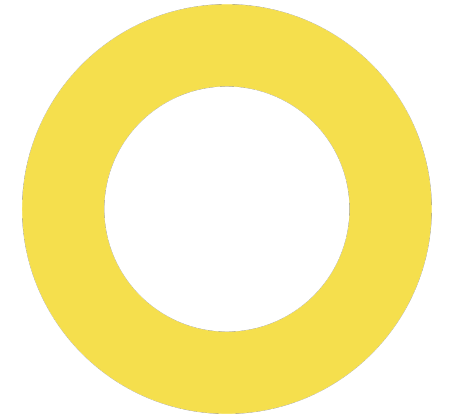
- Environmental protection (technologies) is a **very important** economic factor in Germany...
 - **Great global demand** for German environmental protection goods
 - 14 % share in environmental technology and resource efficiency world market compared to 3 % share in general world market ¹
 - **high growth** in the world markets for *environmental and efficiency technologies*
- ... affecting labour market
 - 6.4% of the total workforce in environmental and climate protection sector (2019)
 - **Environment-specific skills will increase**, e.g. awareness of sustainability and environmental protection or specific environmental knowledge. ²
 - Increase in skilled labour shortages to be expected in the fields of construction, crafts and energy technology (biggest stumbling block to development) ³





Situation of young people and career choice behaviour

Young People: Motivation and Labour



Wishes:

- Good work-life balance*
- little stress
- varied work
- pleasant team integration
- good opportunities for further training to promote one's own talents
- flat hierarchies

Worries:

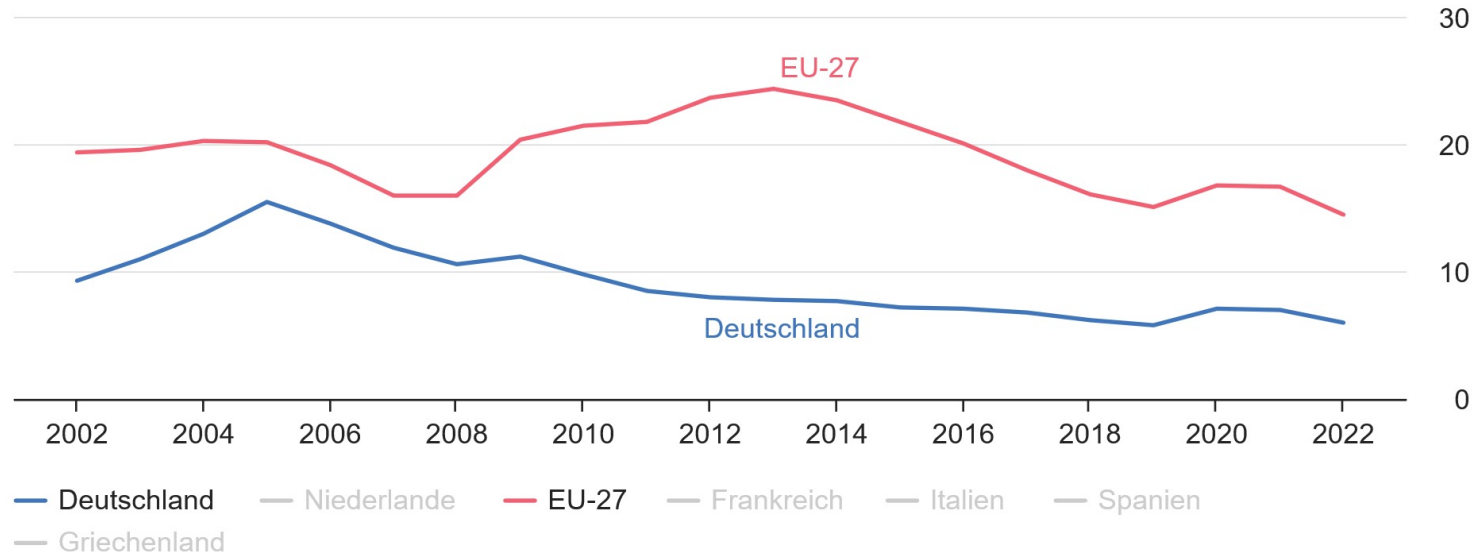
- Climate crisis, Ukraine war and economic inflation cause anxiety*
- End of the prosperity years **



Youth Employment

Jugenderwerbslosenquote in ausgewählten EU-Staaten

in %



Quelle: Eurostat

© Statistisches Bundesamt (Destatis), 2023

- Germany has lowest youth unemployment rate in the EU
- Yet increasing number of NEETS (9% of 20-24 year olds in 2022)

Training after school in Germany

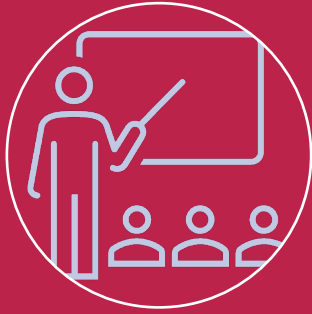


In-company training

Approx. 3 years Salary!

Company + vocational school

Also possible without school-leaving certificate



School Education

Approx. 2 years

Partly school fees

Mostly from MSA



University studies

(technical college or university)

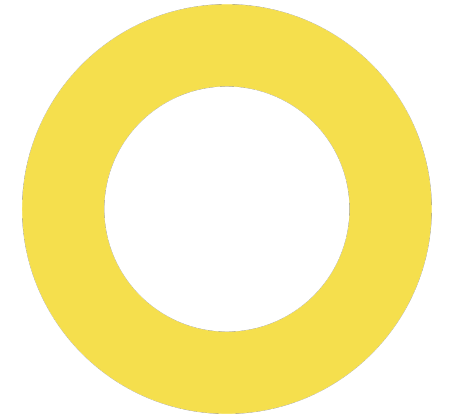
Mostly free of charge

With Abitur

Vocational training

University

Trends in career/orientation choices



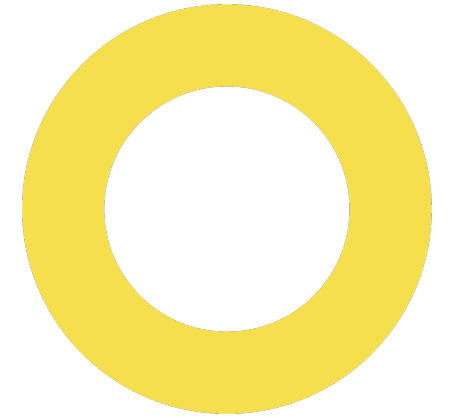
- Academic career options are much more wanted than handicraft jobs
- Mismatch: Not the needed skills for the open jobs
- Number of filled (vocational) training places is declining
- Most popular training occupations
 - Male*: Motor vehicle mechatronics technician, IT specialist, plant mechanic for sanitary, heating and air-conditioning technology
 - Female**: Office management assistant, Medical assistant, Dental assistant



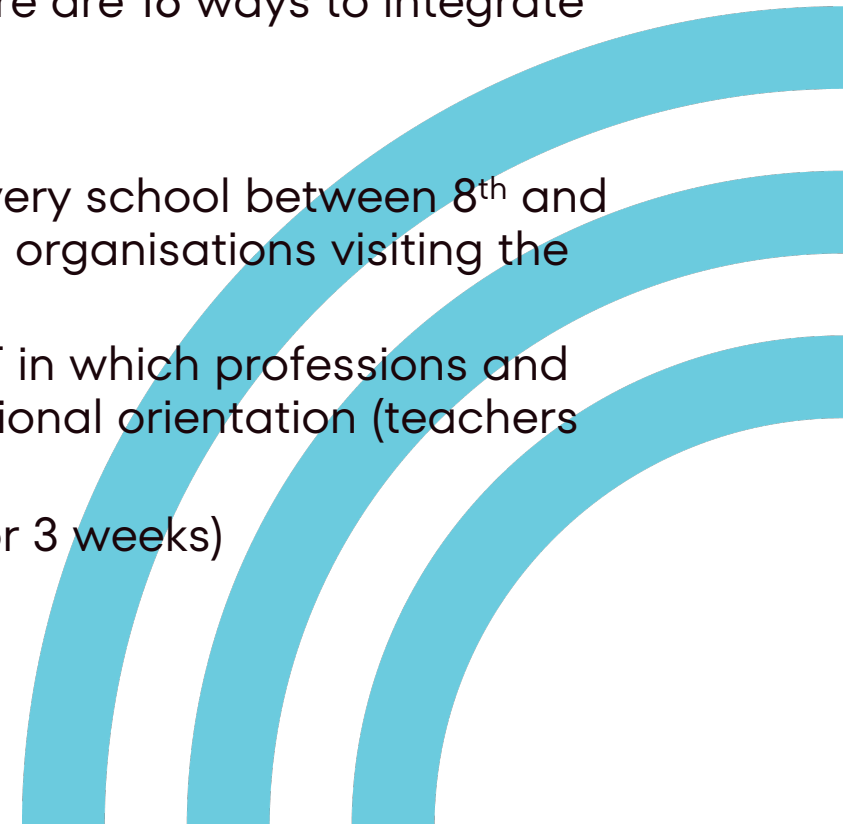


Good practices of vocational orientation

Approaches of structural career guidance



- **Central state vocational guidance** within the Berufsagenturen (vocational agencies)
- Education in Germany is **regionally organized** (16 Regions), so there are 16 ways to integrate vocational orientation in the school system
- Example of Berlin:
 - Programme BVBO that integrates vocational orientation in every school between 8th and 10th grade. This programme is conducted by external training organisations visiting the schools
 - In secondary schools (7th-10th grade) there is the subject WAT in which professions and skills are addressed. There are also staff specialised in vocational orientation (teachers and social workers)
 - Compulsary internships in schools in the 9th or 10th grade (2 or 3 weeks)



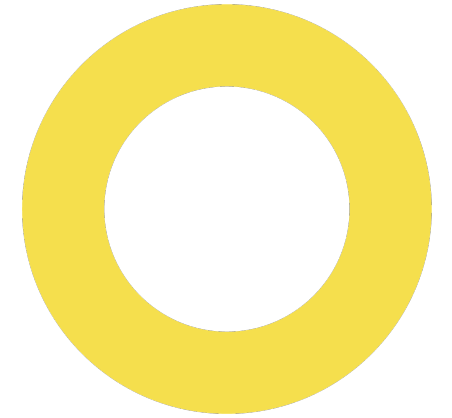
Examples of good career guidance at the state vocational guidance service

- The German Labour Agency (Agentur für Arbeit) is offering very good media services and programmes for young people like coaching, open advice sessions etc.
- Films about professions and courses of study at <https://web.arbeitsagentur.de/berufetv/start>
- A "strengths game": <https://gesucht-gefunden-ich.planet-beruf.de/>
- The brochure series "Abi.de" or "Planet-Beruf" of the central Federal Employment Agency only deal with young people's choice of occupation and study ¹. Role clichés are often the topic. For pupils with A-Levels:

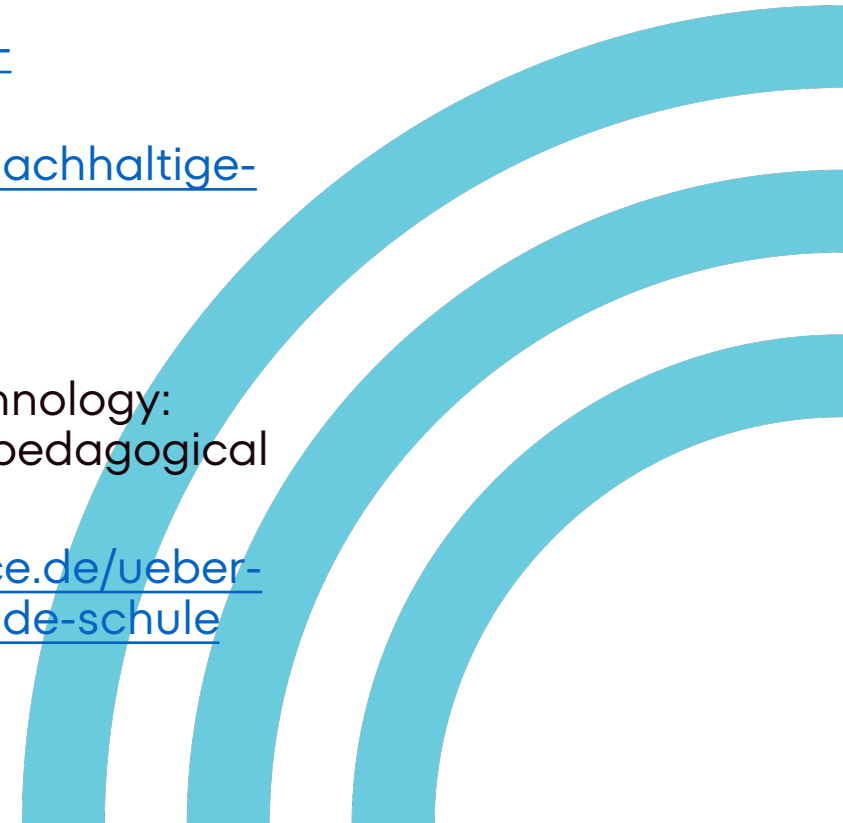
https://mediaserve.kompetenzz.net/filestore/2/6/1/0/9_550020ddb3abec8/26109_5282a2a19e89874.pdf?v=2022-03-10+09%3A59%3A35

- For pupils without A-levels: <https://planet-beruf.de/lehrkraefte-und-bo-coaches/berufswahl-unterricht/schritt-fuer-schritt-zum-beruf/tipps-eine-klischeefreie-berufswahl-foerdern>
- A career information centre with books and e.g. PC workstations ²

Practices of career guidance



- Wide range of **state-funded voluntary services** -> Almost 100,000 people do voluntary service* every year (2020/21)*
- Different organizations provide a range of materials, for example
 - Virtual reality – first steps in a new career: <https://www.deinerstertag.de/beruf/zimmererin-das-deutsche-baugewerbe/>
 - Hands on career orientation camps in holidays: <https://www.nachhaltige-berufsorientierung.de/>
 - handwerk@school bei SHK: <https://www.shk-berlin.de/kompetenzzentrum/sonderprojekte/handwerkschool>
 - Example for the combination of environment, women and technology: Enter Technik ** 1 year, 4 internships in technical companies, pedagogical support
 - Teaching materials from Greenpeace: <https://www.greenpeace.de/ueber-uns/umweltbildung/digitalisierung-nachhaltigkeit-berufsbildende-schule>



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Labour market in Northern Italy

Green Economy, digitalisation, gender equality
and skills in vocational training and orientation
– a country specific insight on trends.



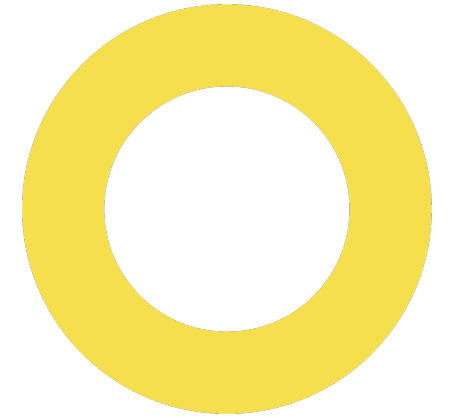
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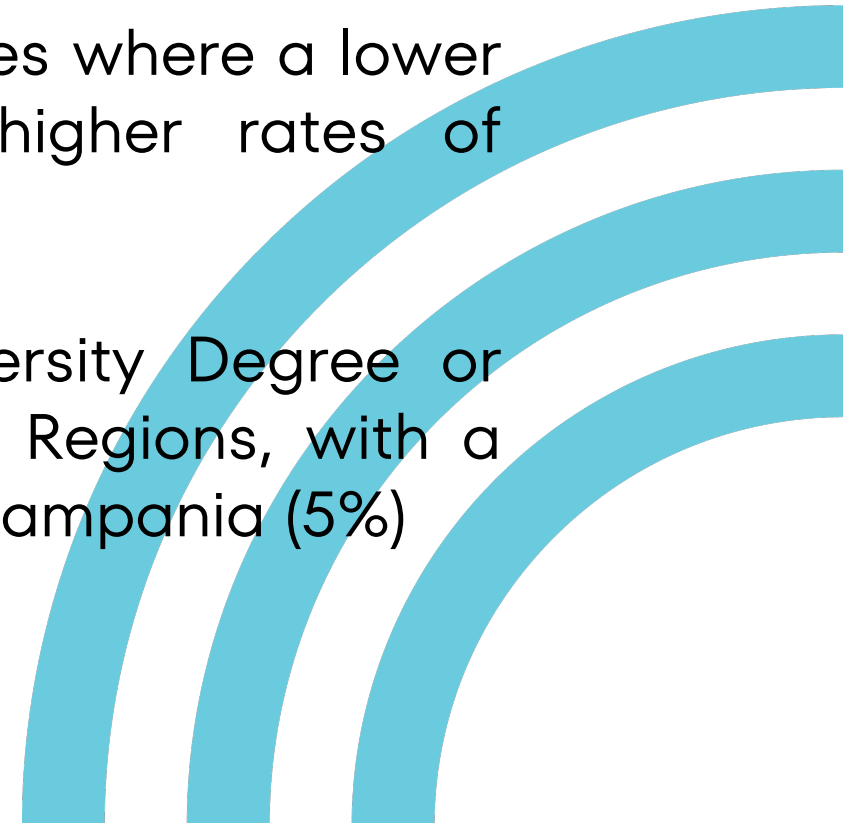


labour market developments

Labour Market Trends in Northern Italian Regions

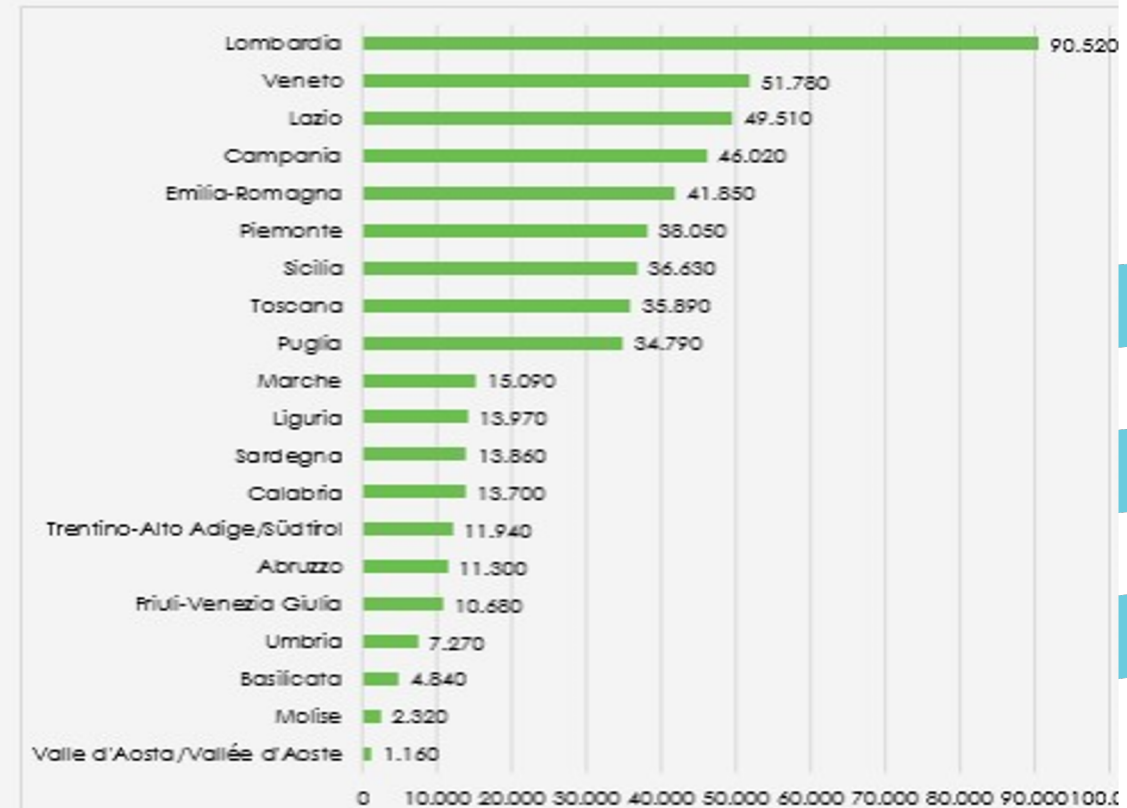


- Northern Italy will “loose” approximately **1.2 million workers** (aged 15-64) in the next ten years: The professional fields that will suffer the most from this drainage will be the ones where a lower qualification is required: this will result in higher rates of **overeducation** in the working place
- 70% of the tertiary offers (concerning a University Degree or something equal) are issued from the Northern Regions, with a peak in Lombardy (30%), with the lowest rate in Campania (5%)
- 17% of NEET



Sustainability and Green Economy

- In the past, Northern Italy emerged as the most dynamic area in terms of green investments; in the last five years, the strong relative growth in green investments by companies in other areas of the country has **reduced territorial imbalances**.
- The National mean in green investments is now around **37,6%**, with a peak in the **North-West (38,7%)**
- Investment in green sustainability leads to **higher prospects for recovery** than other firms in all geographic breakdowns: the share of eco-investor firms that are confident of recovery by 2022 is **35%** in the case of North Central firms (compared to 22% for non-investor firms).
- The hope is that thanks in part to the NRR funds earmarked for environmental sustainability and the green transition, the green employment trend will be able to impose its own diversified trend in relation to the general labor market trend, so that it will also act as a **revitalizing factor for total employment**



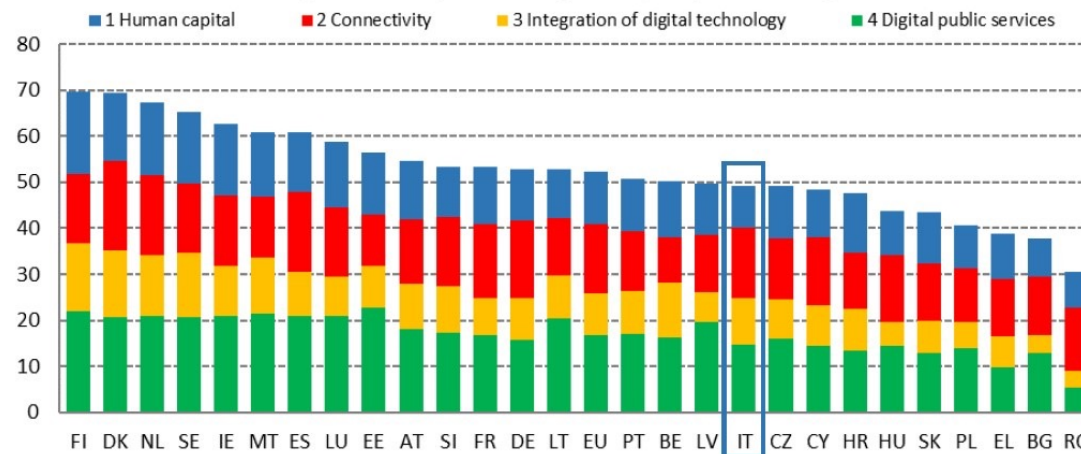
Nelle prime cinque regioni sono concentrate il 52,7% delle imprese che nel quinquennio 2017-2021 hanno effettuato investimenti green.

Digitalisation

- In the **European Commission's Digitization of Economy and Society Index** (DESI 2022), Italy ranks **18th** out of 27 EU member states, ahead of only Romania, Greece and Bulgaria.
- the **"Human Capital" dimension**, i.e., the one that concerns digital skills, scores very low, and **Italy is ranked 25th out of 27**.
- In the **"Digital Technology Integration"** dimension, i.e., that which concerns digitization in enterprises, Italy is now **8th** in the ranking, with a fast growth from the last report (where the Country was almost at the last place)
- Geographical analysis of the Italian digital market identifies **the Northwest and Central regions** as the areas with the greatest capacity for spending on technology, accounting for nearly 62 percent of total spending
- Most advanced sectors: **1. Means of transport, mobility and logistics, 2. ICT, digital and innovative services, 3. Mechatronics and engineering.**
- In an analysis conducted by Confindustria's Digital Innovation Hub, on a sample of 58 percent micro-small businesses and 42 percent medium-to-large businesses, **more than 2/3 of the companies analyzed are located in the North, with a clear prevalence in the Northwest**, one-fifth in the South and Islands, and the remaining 11 percent in the Center



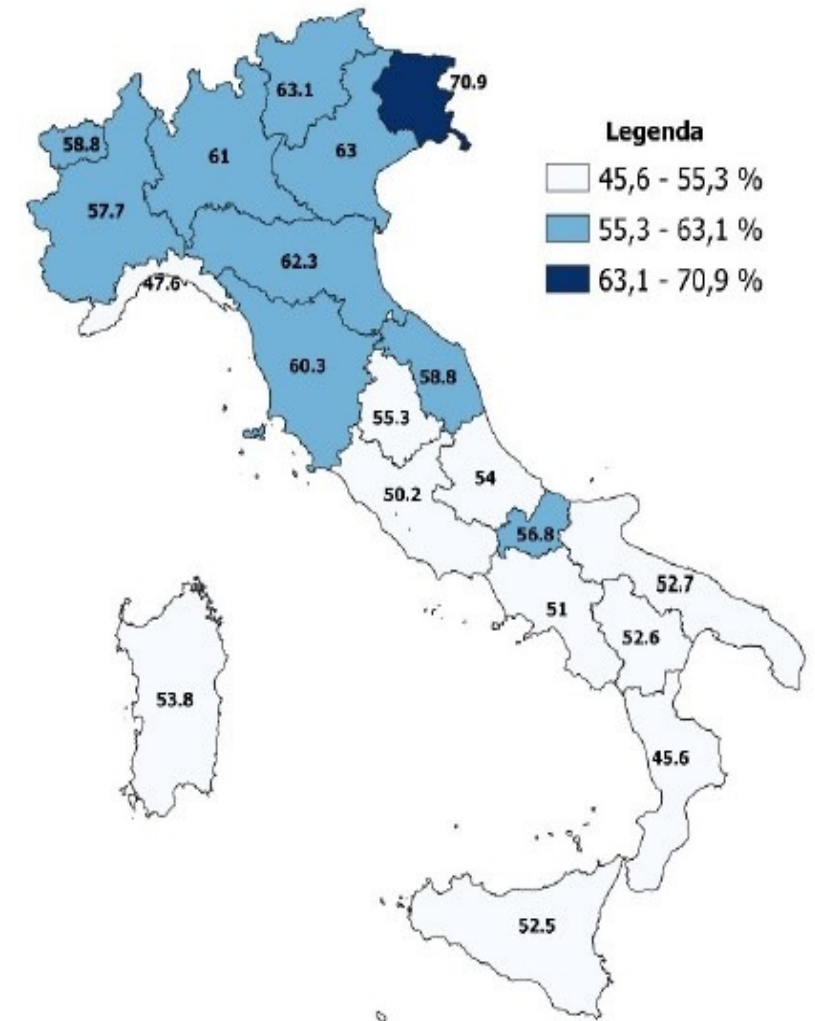
Digital Economy and Society Index (DESI) 2022 ranking



Gender equality & labour market

- In Italy, there is an **18 percent gap between male and female employment** rates. According to 2022 data, 69.2 percent of men aged 15 to 64 were employed, compared to 51.1% of women in the same age group. The most recent data released by Istat for 2023 show a slightly narrowed gap: in April, the male employment rate was at 69.8%, while the female employment rate was 52.3%**(down 17.5%)**.
- The female employment rate has certainly improved since the most acute phase of the pandemic, when it had **fallen back below the 50%** threshold, but nonetheless it is still considerably distant from both the 62.7% European average and the 60% threshold that according to the Lisbon Strategy Italy was supposed to reach by 2010
- In 2022, the share of young people not working and not studying (so-called NEETs) in the population aged 15-29 is estimated at 19.0% and is higher among females (**20.5%**) than among males (17.7%).
- The top northern region in terms of incidence of **NEETs is Liguria (21.1%)**, followed by Piedmont (20.5 percent) and Aosta Valley (19.6%).
- In fact, all northern regions except Liguria have **high proportions of women NEETs compared to men**, particularly 71 percent in Friuli-Venezia Giulia, 63 percent in Trentino-Alto Adige and Veneto, 62.3 percent in Emilia-Romagna, 61 percent in Lombardy, 58.8 percent in Val d'Aosta, and 57.7 percent in Piedmont. In the Center, the percentages are high for Tuscany (60.3 percent) and Marche (58.8 percent).
- 20% of NEETs out of the total population of Italian NEETs are **inactive mothers**. The motivation for inactivity is often related to gender inequality in caregiving burdens that prevent or suggest that women stay out of or exit the labor market.z

Distribuzione di NEET femmine sul territorio per regione (%)

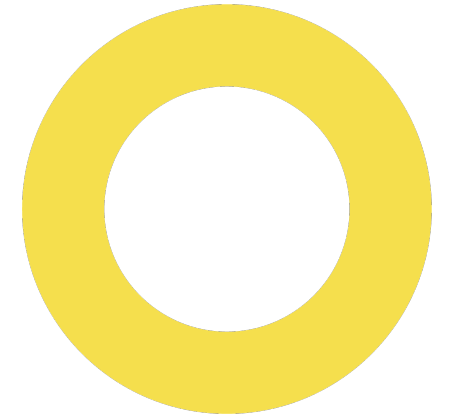


Distribution of female NEETs per region (%)

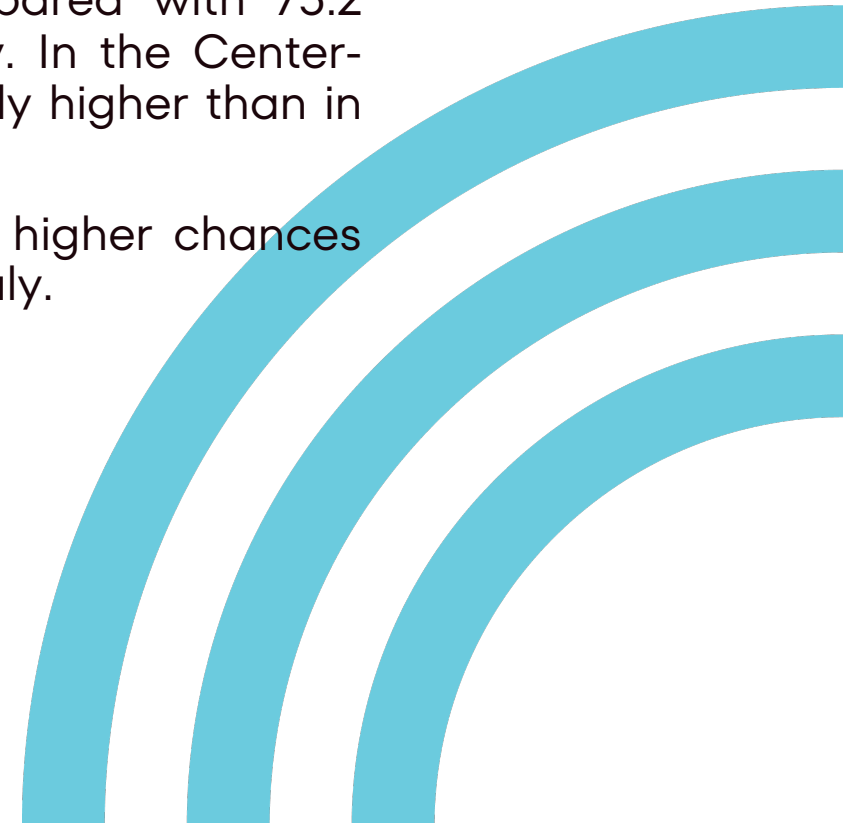


Situation of young people and career choice behaviour

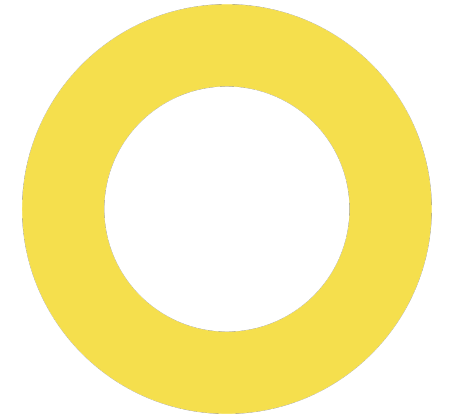
Young People's Working Conditions



- 57,1 % of students choose non-VET secondary schools (Liceo/Gymnasium)
- The share of young people in southern Italy who left the education system with at least an upper secondary diploma is only 64.3 percent compared with 75.2 percent and 74.0 percent in the Center and North, respectively. In the Center-North, the share of those with tertiary degrees is also significantly higher than in the South: one in five young people versus one in seven.
- Young people with University degrees from Northern Italy have higher chances (42%) of being employed vs. persons graduating from Southern Italy.
- University degrees with more occupational perspectives:
 - IT
 - industrial engineering
 - medical and pharma-professions
 - Architecture
 - civil engineering



Young People's Working Conditions



- From a geographical perspective, young people residing in the southern regions have significantly fewer entries into the labor market than the rest of the country, signaling the most uneasy conditions in employment placement: **42.7%** of young people who have left the education system is employed in the South, **65.5% in the Center** and **73.2% in the North**.
- Young people possessing at most the secondary school leaving certificate interrupt a subsequent educational pathway mainly due to **difficulties and/or lack of interest in the studies they have undertaken**. One young person in two in fact leaves upper secondary school (or alternative paths in the education system and vocational training) for these reasons, which are **more relevant for men than for women** (54.7% and 45.1% respectively).
- The **desire to start working** is the second reason, more accentuated among **men** and in the North Central regions. For **women**, early school dropout is also due to **family reasons**, understood not only as commitments and responsibilities, but also as possible lack of family support/encouragement

Young People's Working Conditions

Underutilization of available human capital (the phenomenon of **overeducation**), i.e. the mismatch between the level of education attained and the profession performed is quite frequent among young people.

In 2016, **38.5%** of young high school graduates and college graduates aged **15-34** (about 1.5 million) say that a **lower level of education than they have would be sufficient** to adequately perform their job (41.2% of high school graduates and 32.4% of college graduates)

PROSPETTO 7. GIOVANI DI 15-34 ANNI DIPLOMATI E LAUREATI CHE DICHIARANO DI SVOLGERE UN LAVORO DOVE SAREBBE SUFFICIENTE UN PIÙ BASSO LIVELLO DI ISTRUZIONE RISPETTO A QUELLO POSSEDUTO PER TITOLO DI STUDIO, SESSO, RIPARTIZIONE GEOGRAFICA, TIPOLOGIA LAVORATIVA E GRADO DI ISTRUZIONE DEI GENITORI. Il trimestre 2016 (valori assoluti e incidenze percentuali)

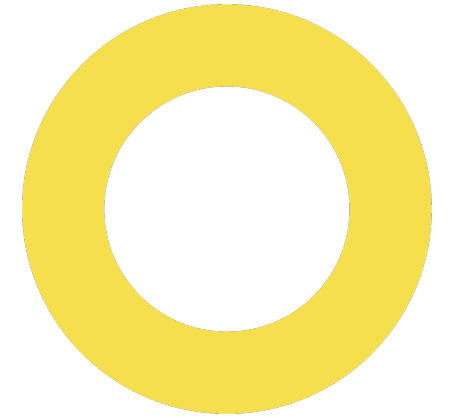
TITOLO DI STUDIO	Terziario	Secondario superiore	Totale	Terziario	Secondario superiore	Totale
Valori assoluti (in migliaia)			Incidenze percentuali			
SESSO						
Maschi	148	659	807	31,3	40,3	38,3
Femmine	234	465	700	33,2	42,5	38,8
RIPARTIZIONE GEOGRAFICA						
Nord	216	570	786	32,9	39,6	37,5
Centro	95	240	335	36,7	42,9	40,9
Mezzogiorno				27,0	42,9	38,7
TIPOLOGIA LAVORATIVA						
Autonomi	54	145	199	20,8	36,1	30,1
Dipendenti a tempo indeterminato	204	614	818	35,5	39,5	38,5
Atipici	126	365	490	35,9	47,1	43,6
GRADO DI ISTRUZIONE DEI GENITORI (a)						
Al più secondario inferiore	73	549	622	32,0	44,1	42,3
Secondario superiore	209	486	695	32,3	38,5	36,4
Terziario	97	81	178	33,2	42,4	36,9
Totale (b)	383	1.124	1.507	32,4	41,2	38,5

(a) Al netto di 45 mila casi di mancata risposta sul titolo di studio dei genitori.

(b) Al netto di 84 mila casi di mancata risposta..

Youngsters coming from High schools and University that work in positions where lower qualifications would be required (divided by gender and geographical provenence)

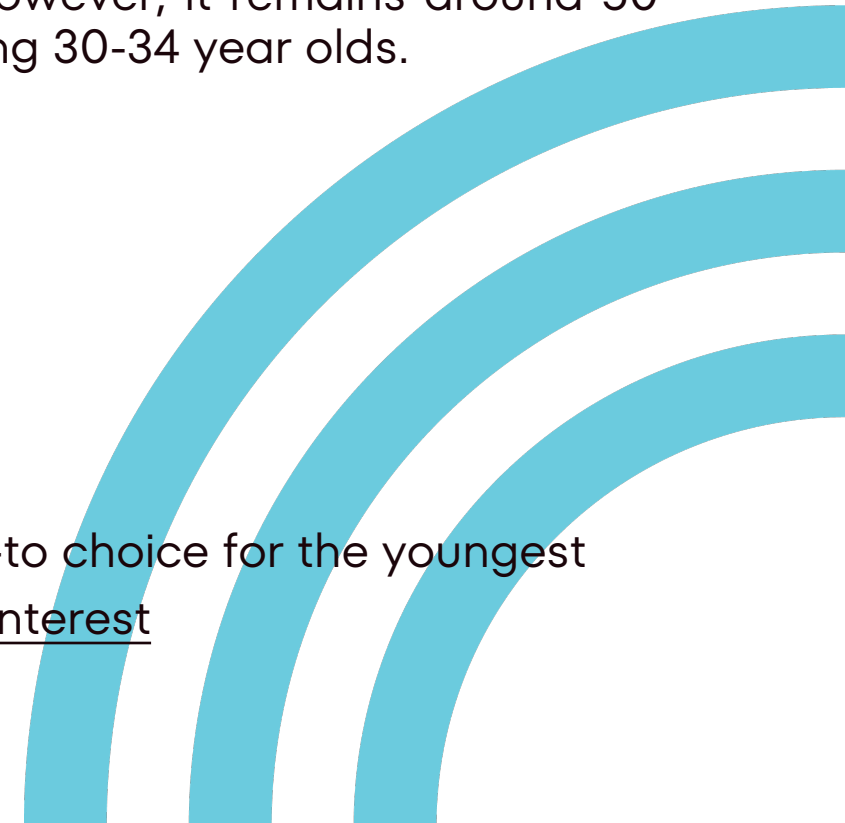
Young People's Working Conditions



- Slightly more than one out of two young people has a **permanent salaried job**, with higher incidences in the North (57.8%) than in the South (51.5%). This type of contract-which is not very common in the younger age groups-increases as age increases; however, it remains around 50 percent among 25-29 year olds and only reaches 64.3 percent among 30-34 year olds.

Youngsters' dream jobs:

- Higher interest in healthcare professions
- Raising demands for humanities studies
- Entertainment jobs (acting, social media influencers) are the go-to choice for the youngest
- Law enforcement and justice professions are no longer of high interest





Good practices of vocational orientation

Good practices for VET orientation/empowering future skills



- **Progettiamocilfuturo** – a Regional guidance project in Liguria, funded by the European Social Fund, that reaches yearly thousands of students, teachers, educators and families, promoting longlife and extended guidance pathways (website: <https://progettiamocilfuturo.it/>)
- **Toscana Region communication plan on guidance** – thanks to the support of various testimonials and an attractive layout, Toscana's regional guidance expert manages to create a programme for guidance that is appealing and interesting for the youngsters (website: <https://www.regione.toscana.it/-/orientamento-scolastico/campagne-informative>)
- **Piemonte Region guidance offer** – thanks to a strong link with local third sector realities, Piemonte has opened more than 100 council points for guidance throughout its large territory, thus enhancing the chances of all youngsters in the Region to receive counselling (website: <https://www.regione.piemonte.it/web/temi/istruzione-formazione-lavoro/orientamento/sportelli-regionali-orientamento>)

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<https://adeccogroup.it/valore-al-lavoro/giovani-e-lavoro/>

<https://adeccogroup.it/il-lavoro-dei-sogni/>

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Labour Market Trends in Southern Italy

Green economy, digitalisation, gender equality
and skills in vocational training and orientation –
country specific insight on trends.



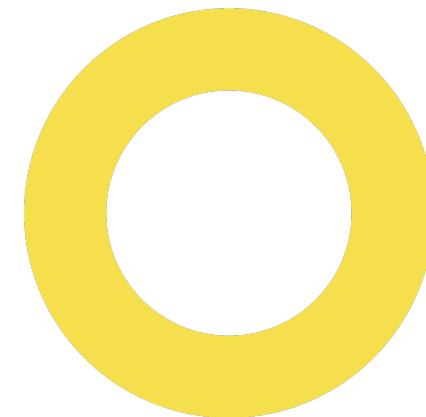
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Labour Market Developments



Labour Market Trends



- Unemployment rate: 13,8% in Southern Italian regions (ISTAT 2022)
- The Next Generation Funds (in Italian PNRR) will have a high impact in public investment in technology, education, health sectors across Italy, with 40% of the funds going to Southern Italian regions
- Expected labour force demand in the future follow main trends in Italy: **health-related and social assistance professions, engineers, skilled workers in the construction and medical fields, workers in tourism and catering, highly specialised roles such as project managers** (due to strong public sector).
- Demographic trends – high percentage of emigration (within Italy and abroad) of labour force, reaching 2 Mio. Persons btw 2002-2020, of which more than 50% aged 15-34, puts skilled workforce turnover at risk.

In these slides, we identify Southern Italy with what is called the „Mezzogiorno“ regions and the islands: Abruzzo, Molise, Campania, Basilicata, Puglia, Calabria and the islands Sicilia and Sardinia

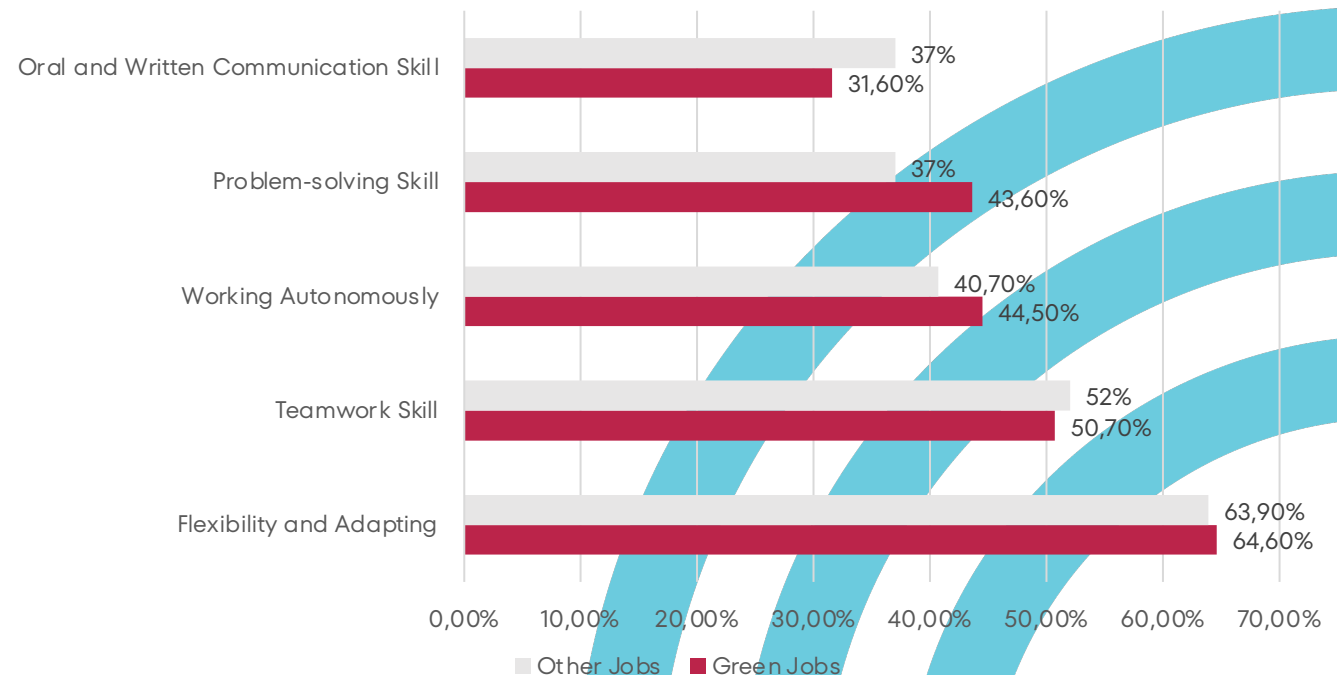
Gender Equality

- Women's employment rate 33% vs. 60% men's employment rate (age 15-64 yrs) (ISTAT 2022: Only 50% of women who could potentially work is employed (so called labour market slack)
- Parentings as an obstacle: in 2020, 77% of adults with children 0-3 yrs old who resigned from work were women.
- Occupational roles of women in Italy
 - 0.9% Managers
 - 16,5% of intellectual and scientific jobs
 - 22,7% office jobs
 - 23,8% in commerce and services.
- Gender payroll gap is stronger in the private sector: **around 32% less annual wage than men**; more (non-voluntary) part-time jobs among women (almost 20% vs. 6% for men)
- 33% of women aged 15-34 are NEET in Southern Italy

Sustainability and Green economy

- 38% of companies in Southern Italy have made eco-investments in 2017-2021 (average in Italy 37%);
- Companies investing in ecological processes and products have a higher competitiveness; invest more in technological innovation.
- Eco-investments in all regions the last 5 years has cancelled the gap between North and South Italy in the green economy.
- Green jobs in Italy: 13,7% of total jobs, in Southern Italy 22%. Demand for green jobs has been rising Italy-wide, but less in Southern Italy.
- Jobs where green skills are highly demanded: managers, skilled workers in commerce and services, intellectually and scientifically specialised workers.
- Green skills: the main required skills are flexibility, autonomy, problem solving (see graph)

Percentage of hirings for which each skill is considered to be "very important", out of total recruitment



Digitalisation

- Digitalisation in productive process less developed and workers less digitally skilled compared to Northern Italy: economy based on SMEs
- Digitalisation of economy and rise in digital jobs follow European trends, however only 46% of industrial enterprises and 43% of services have employers with advanced digital skills in Southern Italy
- 30% of companies that have employed persons after investments in digital field are in Southern Italy
- Required e-skills in Italy:
 - ability to use Internet technologies and to manage and produce visual and multimedia tools
 - ability to use mathematical and computer languages and methods to organise and evaluate qualitative and quantitative information
 - ability to manage innovative solutions through the application to business processes of technologies (digital) robotics, big data analytics, internet of things, etc. (digital skills 4.0).

FIGURA 20 – PRINCIPALI FIGURE PROFESSIONALI INSERITE IN AZIENDA PER IMPLEMENTARE GLI INVESTIMENTI IN TRANSIZIONE DIGITALE (VALORI ASSOLUTI)*

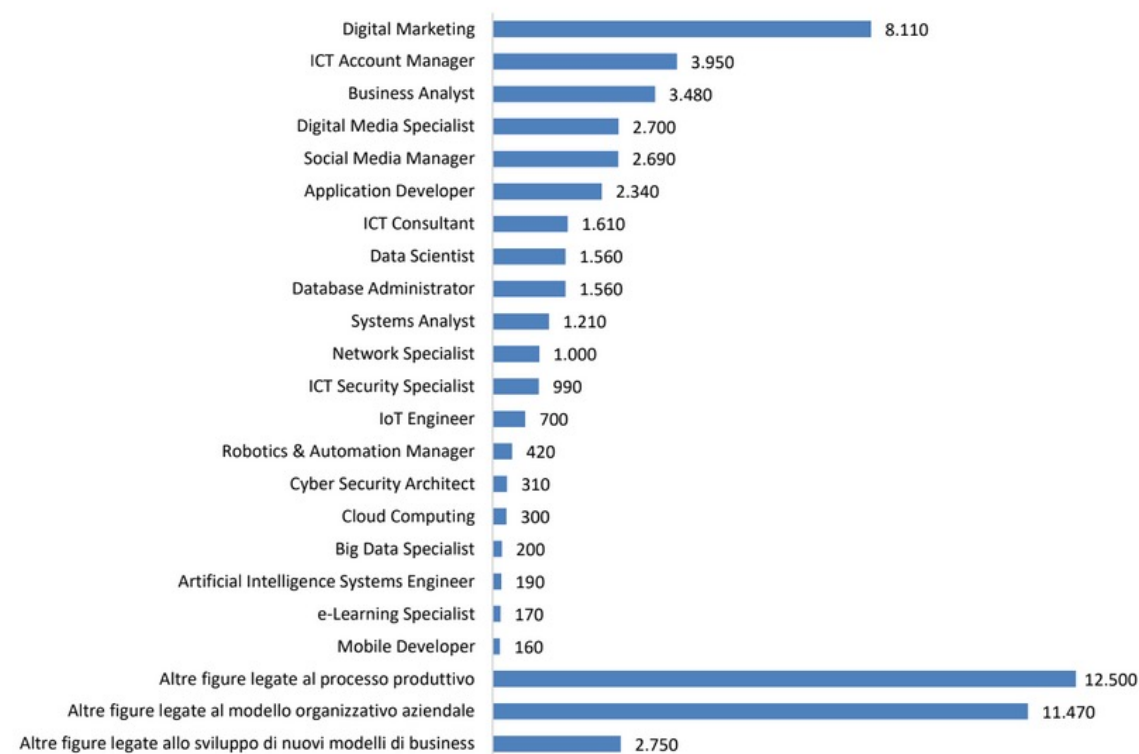
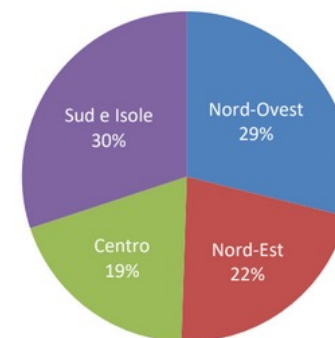


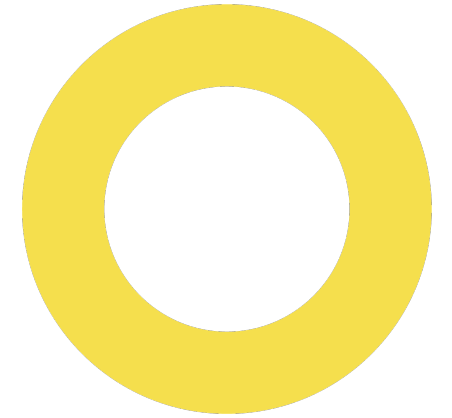
FIGURA 22 – SUDDIVISIONE TERRITORIALE DELLE IMPRESE CHE HANNO ASSUNTO FIGURE PROFESSIONALI A SEGUITO DI INVESTIMENTI DIGITALI (IN %)



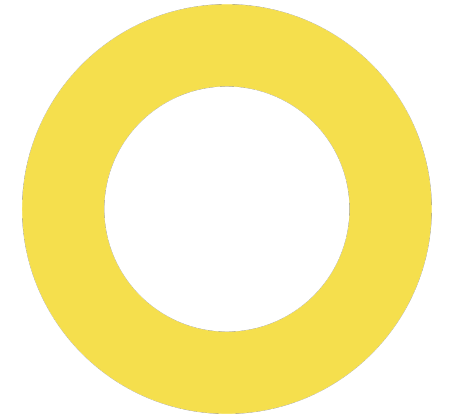


Situation of Young People and Career Choice Behaviour

Young people and their career choice behaviour



- **High youth unemployment** (30%) and number of NEET young people (37%) in Southern Italy
- 57,1 % of students choose **non-VET secondary schools** (Liceo/Gymnasium)
- Young people with University degrees from Northern Italy have higher chances (42%) of being employed vs. persons graduating from Southern Italy.
- Higher eagerness for mobility compared to youngster in other regions: 48% say they may be move abroad or in other regions (vs 29% of young people in Central Italy and 34% in Northern Italy)
- General trend in survey show more awareness and wish for life-work balance rather than career
- University degrees with more occupational perspectives: **IT, industrial engineering, medical and pharma-professions, architecture and civil engineering**

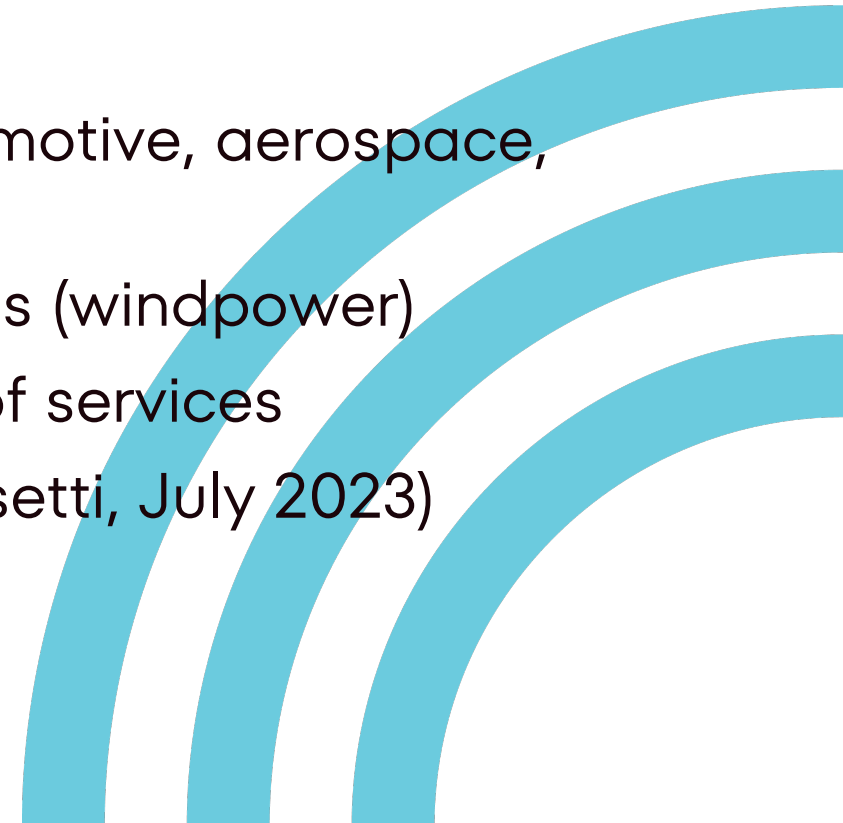


Outlook for the Future

Agenda for Southern Italy in the Mediterranean Space:

- **Blue Economy** (ports, sea economy, logistics)
- **Manufacturing**: invest in twin transition of automotive, aerospace, pharmaceutical, agrifood
- **Energy**: energetic hub, renewable energy sources (windpower)
- **Tourism**: internationalisation and improvement of services

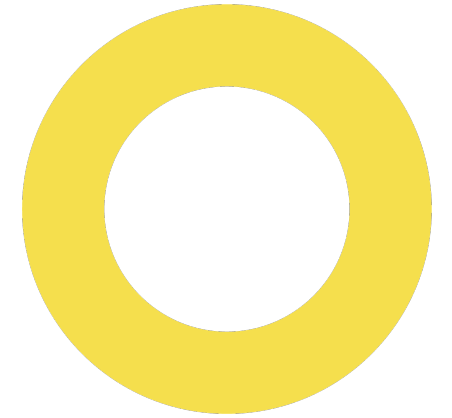
(from Lettera Club, The European House of Ambrosetti, July 2023)





Good practices of vocational orientation

Good practices for VET orientation/empowering future skills



- [Istituti Tecnici Superiori](#): tertiary educational institution modelled on the Fachhochschule system of Germany. Programs have a duration of 2-3 years, and require a secondary school degree for access. For example:
 - [Apulia Digital Maker](#) in Foggia
 - [ITS Cuccovillo Meccatronica](#) in Bari
- StartNet projects such as [Skills for Life](#) or [Go4STEM](#)



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Slide 9

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Labour market in North Macedonia

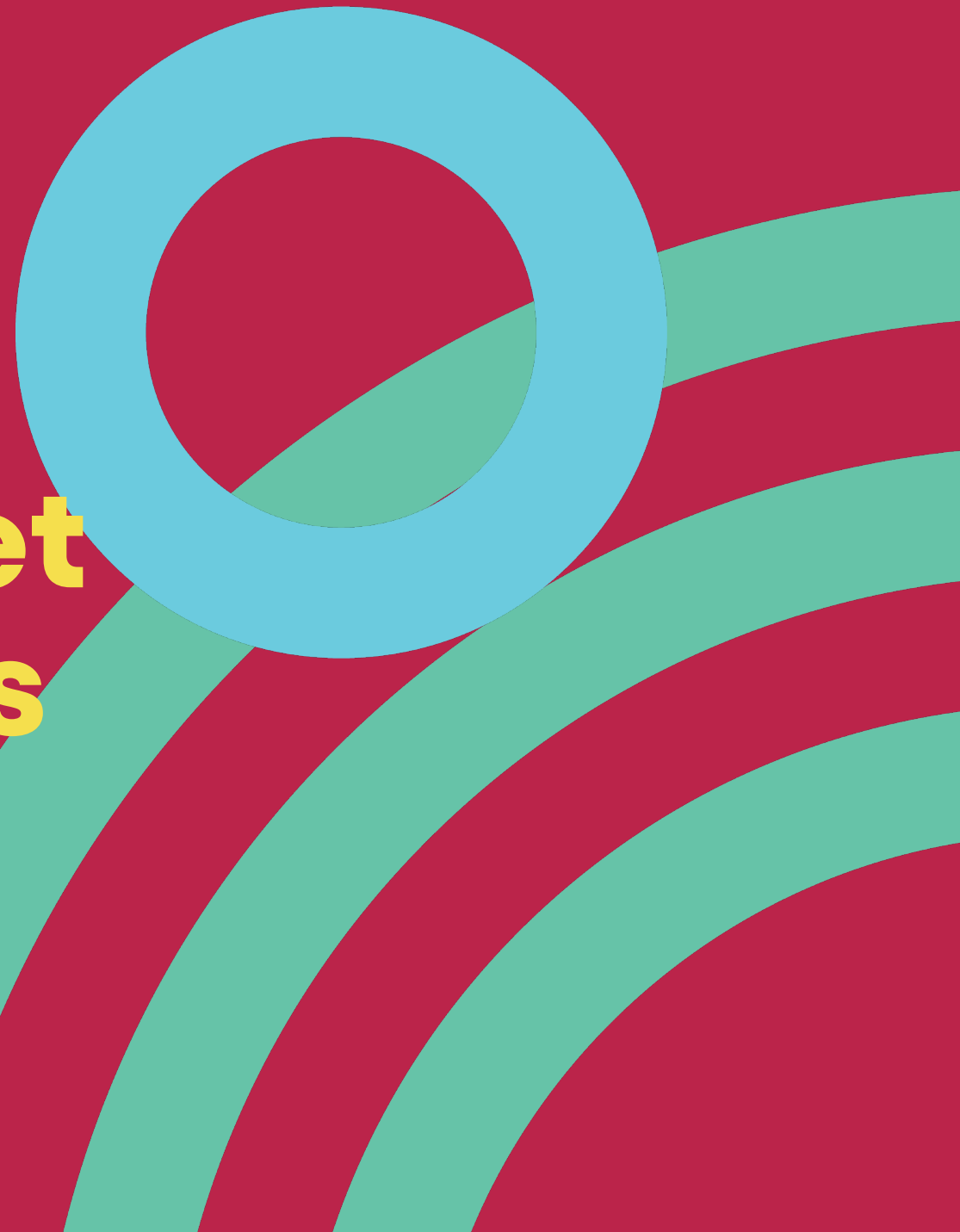
Green economy, digitalisation, gender equality
and skills in vocational training and orientation -
a country specific insight on trends.



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Labour market developments



Labour market developments – 1/2

- **General trends in the labour market:**
 - steady increase of the skills mismatch
 - the difficult transition from education to the labour market among the young workers
 - high figures for NEET rates – especially for young women
- **Key factors affecting employment:**
 - Low quality of the education system -> (un)employment rate, un/skilled workers:
 - EU Skills and Jobs Survey 2023 for North Macedonia: 5% of the participants have lower education qualifications than the required ones, while 14% have higher education qualifications than the required by the employer.
 - inactive population after completing education (64% women)
 - characteristics of labour force: hospitality sector, labor-intensive industries (textile)
 - demographic trends (emigration), decrease in population, internal migration to the cities (reduction of rural population)

Labour market developments – 2/2

- **Gender equality in the labour market:**

- women's employment rate vs. men: 404673 employed man, 287360 employed women
- differences in occupational sectors and wage disparities

- **Sustainability and green economy:**

- trends in the labour market: support from EU for green transition and digital transformation implying *high demand for development of training programmes for green jobs, green skills and skills relevant for the digitalisation of the industries*

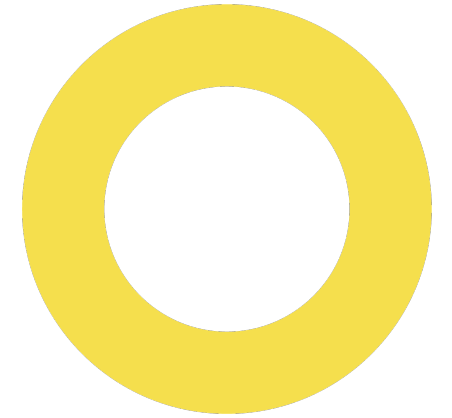
- **Digitalisation in the labour market:**

- Digital literacy of population (30% digitally literate population, EU average = 60%). Digital exclusion due to economic poverty.
- Digital transition of the economy: high demand of digitally skilled workers in IT, renewable energy sector, construction, textile industry. Setting up a new model of regional post-secondary VET training centres.
- According to **EUSJS 2023**, around **45%** of the surveyed workforce in North Macedonia participated in some education and training activities to acquire new skills required by the job, and out of these
 - around 35% of these declared that at least one of their training activities was related to acquiring IT/digital skills.
 - 62% of the surveyed workforce need manual tasks skills at the workforce (EU=50%),
 - 74% use computing device at workplace (EU=87%) and 62% of these are using web for the work (EU=87%), 30% are using computer machinery (EU=39%). (Source EU Skills and Jobs Survey 2023 for North Macedonia).

A decorative graphic on the right side of the slide. It features a large yellow circle at the top, with three thick, light blue curved lines sweeping upwards from the bottom right towards the center. The text is positioned to the left of these elements.

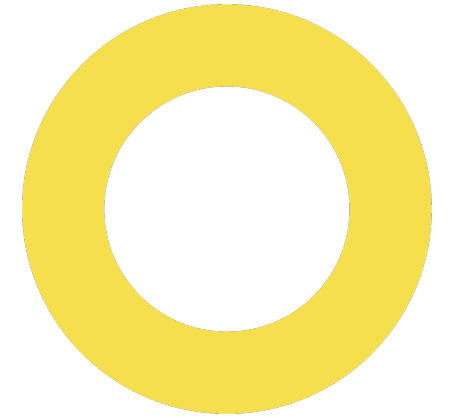
Situation of young people and career choice behaviour

Young people and their career choice behaviour – 1/2



- General situation of young people:
 - Youth (un)employment, NEETs, other relevant statistical data:
 - *NEET percentage for the age group 20-24 years fluctuates between 33.9% and 36% in a time span of six years*
 - *NEET percentage for the age group 25-29 years fluctuates between 41.6% and 45.6% for the same time span*
 - *Despite the compulsory secondary education, still there about 12% youth in age group 15-19 years that is NEET.*
 - Skills mismatch research and analyses results:
 - *"Young people face high unemployment and a very difficult transition from education to the labour market. Many young people remain inactive even after completing education." (Source: Skills Mismatch Measurement In North Macedonia (2019))*

Young people and their career choice behaviour – 2/2

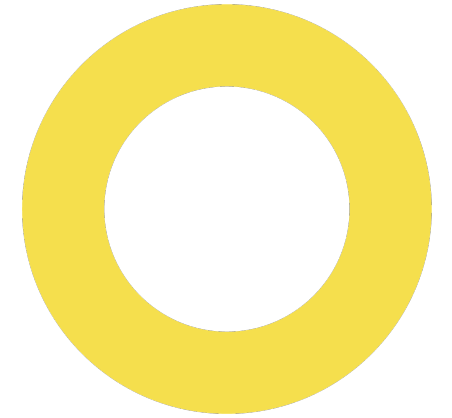


- Trends in career/orientation choices
 - Attractiveness of the IT industry jobs:
 - The result of this is high number of young people seek *enrolment at the Computer Science Faculties* as part of their formal education process, or try *to reskill/upskill and increase their employability through participation in IT related courses* organized and offers by post-secondary VET Centres (Brainster, Seavus academy, SEMOS Education, etc.)
 - Attractiveness of job opportunities abroad:
 - Many young people seek career in professions that could *offer them an immediate employment abroad*. These resulted in high number of enrolled students in medical high (VET) schools, or in the high schools that offer bilingual study programmes (Macedonian-French. Macedonian-English)
 - According to a World Bank study, the young people in the country (and in the region) are more likely to be working on a temporary contract.

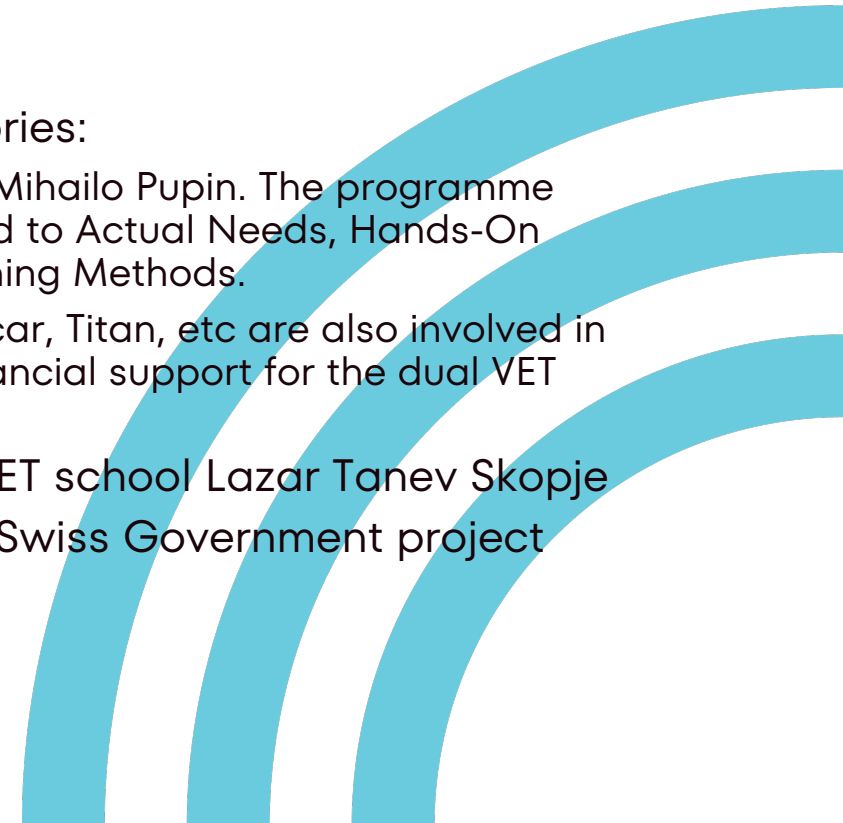


Good practices of vocational orientation

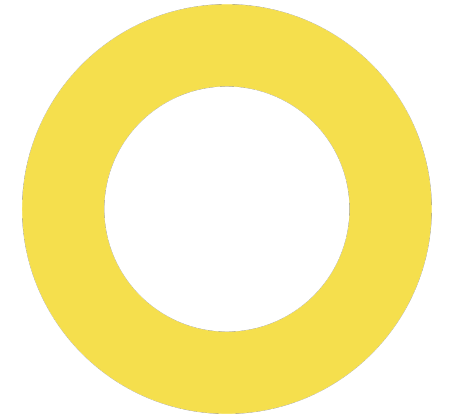
Good practices of vocational orientation – 1/2



- Approaches of structural career guidance
 - Employment Service Agency and Ministry of Labor Social Policy: initiating the national Youth Guarantee programme (only country outside EU)
 - Defining a new model of regional VET centres
 - Introduction of dual vocational education and training. Success stories:
 - EVN introduced Dual VET programme in the Secondary School Mihailo Pupin. The programme offers: Constant Mentorship throughout Schooling, Curriculum Adjusted to Actual Needs, Hands-On Assignments and Scenarios, Educational Resources and Modern Teaching Methods.
 - Other companies, such as Makedonski Telekom, USJE, ESM, Rade Koncar, Titan, etc are also involved in the dual education. One of the measures also includes provision of financial support for the dual VET education students
 - The Coolinari.mk project created in partnership of ARNO and the VET school Lazar Tanev Skopje
 - Organization of conference Skills for Future Jobs supported by the Swiss Government project Education for Employment.



Good practices of vocational orientation – 2/2



- Interesting good practices

- Company MakProgress Vinica:

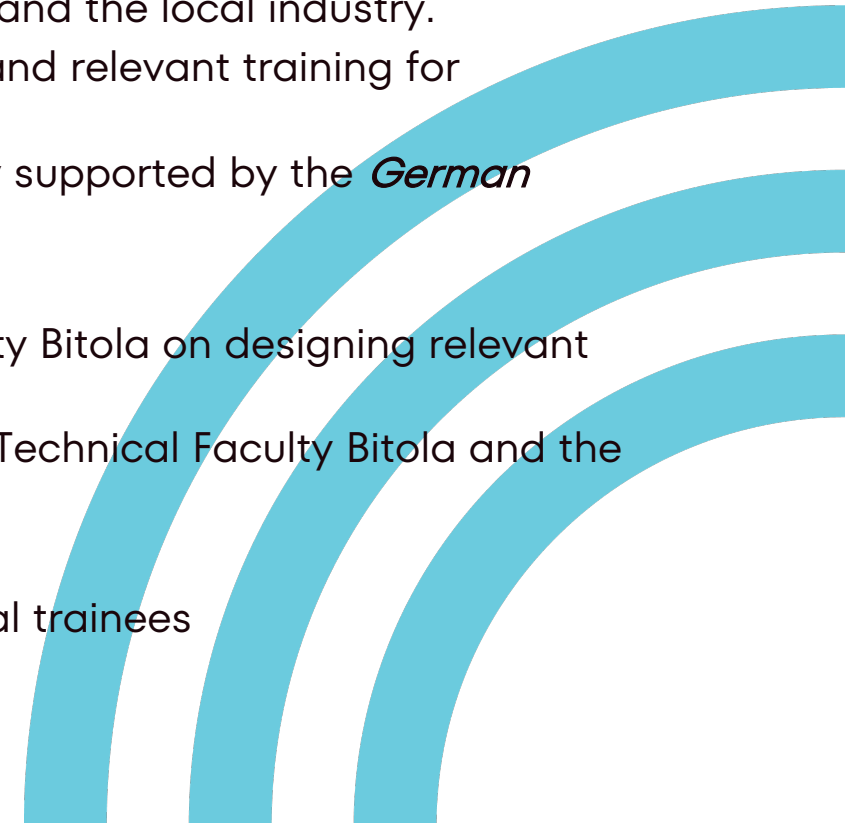
- In 2021 established the Progressive Academy (<https://www.progressive.org.mk/>), a modern post-secondary VET Centre that is a bridge between the secondary VET and the local industry.
 - It supports the young people by provide career guidance services and relevant training for inducting the young unemployed individuals into the industry.
 - The establishment of the Progressive Academy has been financially supported by the *German Regional Challenge Fund*.

- Company Kromberg & Schubert Bitola:

- Supporting the young people by collaboration with Technical Faculty Bitola on designing relevant study programmes;
 - Organizing regular Career guidance events for the students at the Technical Faculty Bitola and the students in the regional VET schools.

- Training Center Brainster:

- Offers a free career guidance test tool for their students or potential trainees (<https://careers.brainster.io/quiz>)
 - Well connected in the regional network of IT companies



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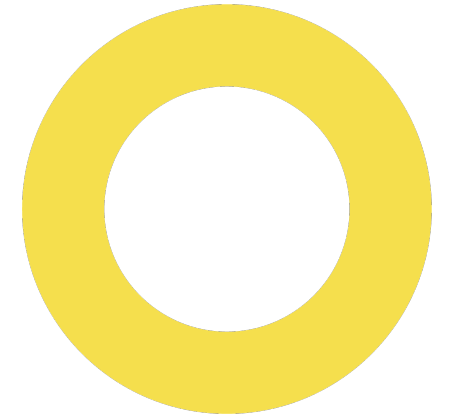
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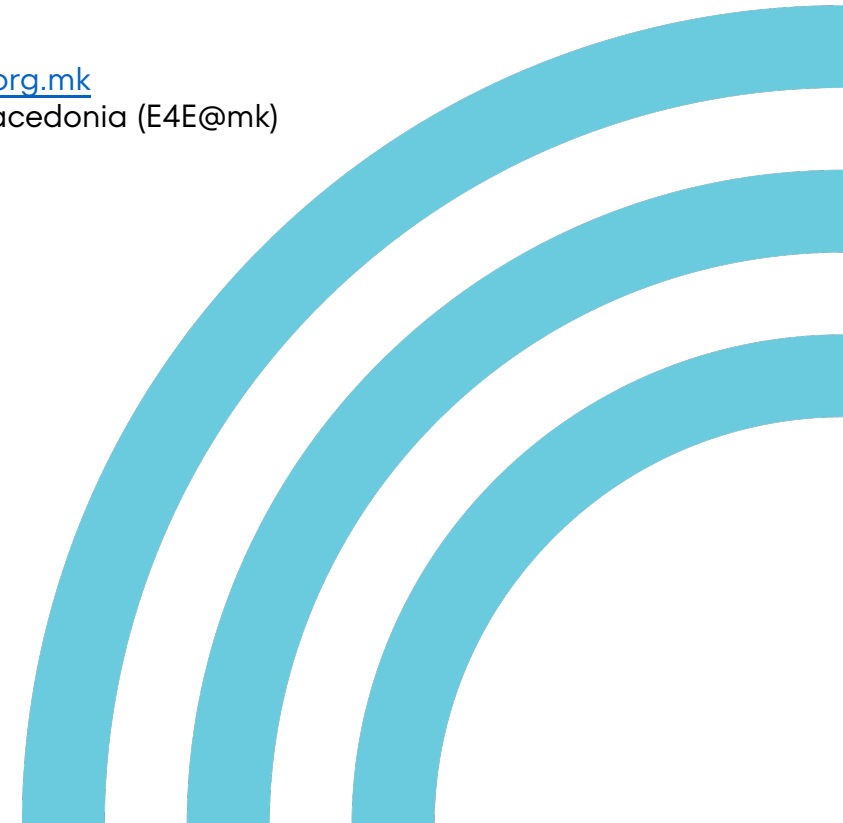
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- MakProgres Vinica Company, Progressive Academy: <https://www.progressive.org.mk/>



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Labour market in Romania

Green economy, digitalisation, gender equality
and skills in vocational training and orientation -
a country specific insight on trends.



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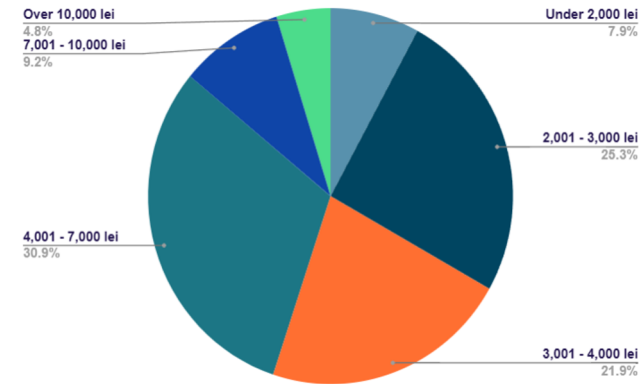
Labour market developments



General trends in the labour market 1/3

- Romania's unemployment rate in August 2023 5.4%. It marked the lowest jobless rate since September 2021.
 - unemployment rate for men 5.9%
 - unemployment rate for women 4.9%
- The highest rates of registered unemployment were recorded in the South-West (5.6%) and the North-East (4.3%) regions. The lowest rates of registered unemployment were recorded in Bucharest (0.9%) and the West region (1.6%).
- On January 1st 2022, active population in Romania was 7.6 million 5.5 million persons were employees, in the following sectors:
 - 3.5 million people services sector
 - 1.85 million persons were employed in industry and construction.
 - 0.1 million persons in agriculture, forestry and fisheries
- According to OECD, Romania's working age population is decreasing fast.
- According to the Ministry of Foreign Affairs, there are 5.7 million Romanians in the diaspora working and leaving aboard.

Salary distribution in Romania in 2022
5.5 million employees



The evolution of the average wage in the economy

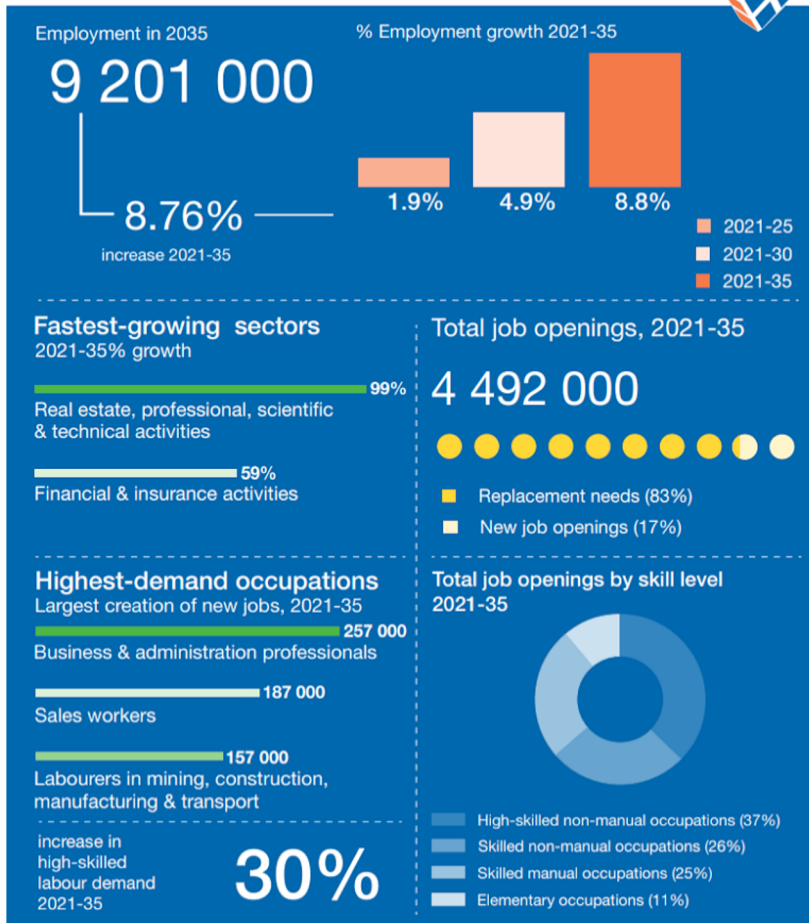
2022	810 Eur
2021	710 Eur
2020	670 Eur

There is growing trend in the in the razing of the average salary. Starting October 1, 2023, the gross minimum basic salary per country is set at 660 eur / per month.

According to Eurostat 2020, the gender pay gap in the EU is 14%, Romania is on the 2nd place in the list of the smallest salary differences between genders at EU level.

General trends in the labour market 2/3

CEDEFOP
SKILLS FORECAST 2023 ROMANIA



3.4%
employment
increase in 2021-35



**Fastest growing
occupation**
Legal, social and
cultural professionals



**Fastest growing
sector**
Information and
communication

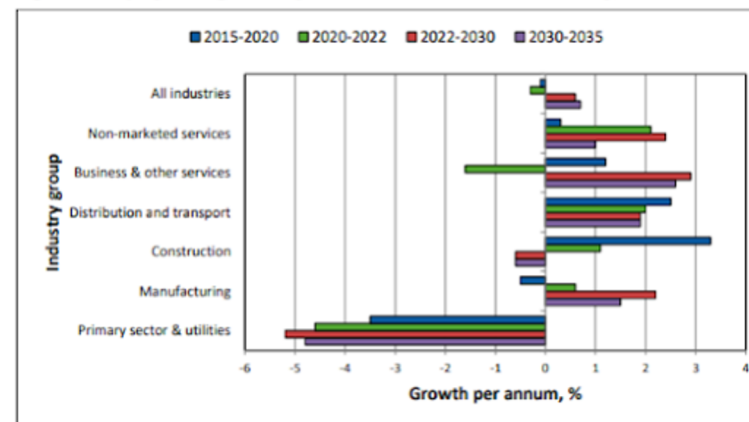
Long term outlook on the labour market:

According to the Skill Forecast by CEDEFOP in the future fastest growing sectors will be the ones based on academic background.

Romania's employment outlook is mixed. Service sectors like Business & other services, Non-marketed services, and Distribution & transport will have a growth of over 2% annually from 2022 to 2030. Manufacturing is also expected to grow by more than 2% annually. The Primary sector & utilities, mainly agriculture, will see a 5% annual decline in employment, affecting a significant part of Romania's workforce.

Figure 3 shows the annual average employment growth by broad sector in Romania between 2015 and 2035.

Figure 3. Employment growth by broad sector of economic activity, 2015-35



Source: Cedefop (2022 Skills Forecast).

Short term outlook on the labour market:

According to ANOFM data, in the first quarter of 2023, most vacancies at national level were registered in the following occupations:

- unskilled workers for the assembly and installation of parts,
- couriers,
- commercial workers,
- unskilled construction workers, security guards,
- goods handlers,
- drivers for road freight transport, assistant cooks,
- salespersons,
- unskilled workers in the ready-made-garment industry.

General trends in the labour market 3/3

Sustainability and green economy:

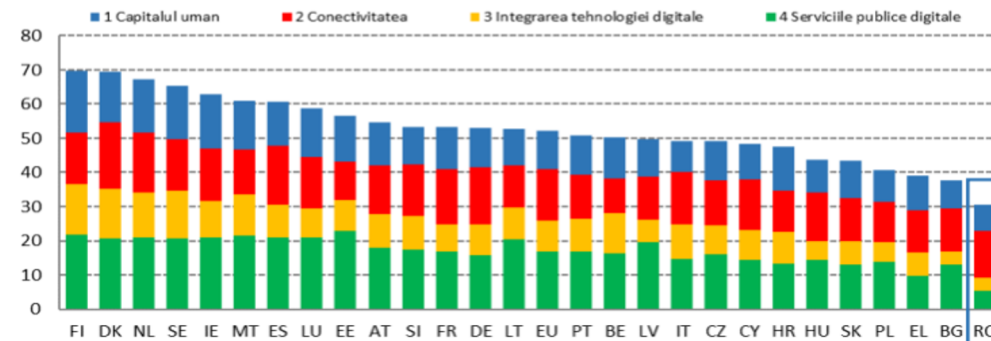
- Environmental issues and the urgent need for energy conservation have been the focal points of the transition to a green economy, with strategies such as:
 - The Deposit-Return System (DRS) will become operational in Romania starting from November 30, 2023, at which point consumers will be able to return PET, glass, and metal packaging in an organized system.
 - National waste management: Romania has a budget of 1.2 billion euros available through the National Recovery and Resilience Plan for managing all types of waste. The country must implement the projects it has committed to by the year 2026
 - National program for alternative sources for electricity and subsidizing of electric cars and encouraging energy efficient buildings

Digitalisation in the labour market:

- Romania ranks 27th out of the 27 EU member states in the 2022 edition of the Index digital economy and society (DESI).
- Digital challenges for Romania include connectivity especially in rural areas, lack of digital skills, below EU average digitalization of schools, households, companies and public services. Existing capacities are not sufficient to ensure a high level of network security and adequate cyber risk management.
- On the other hand Romania is maintaining the leading place in terms of the proportion of female ICT specialists in the workforce(2nd place), and is maintaining the number of ICT graduates (4th place).

DESI 2022	România		UE
	loc	punctaj	punctaj
	27	30,6	52,3

Clasamentul pentru 2022 al Indicelui economiei și societății digitale (DESI)





Situation of young people and career choice behaviour

Young people and their career choice behaviour 1/2

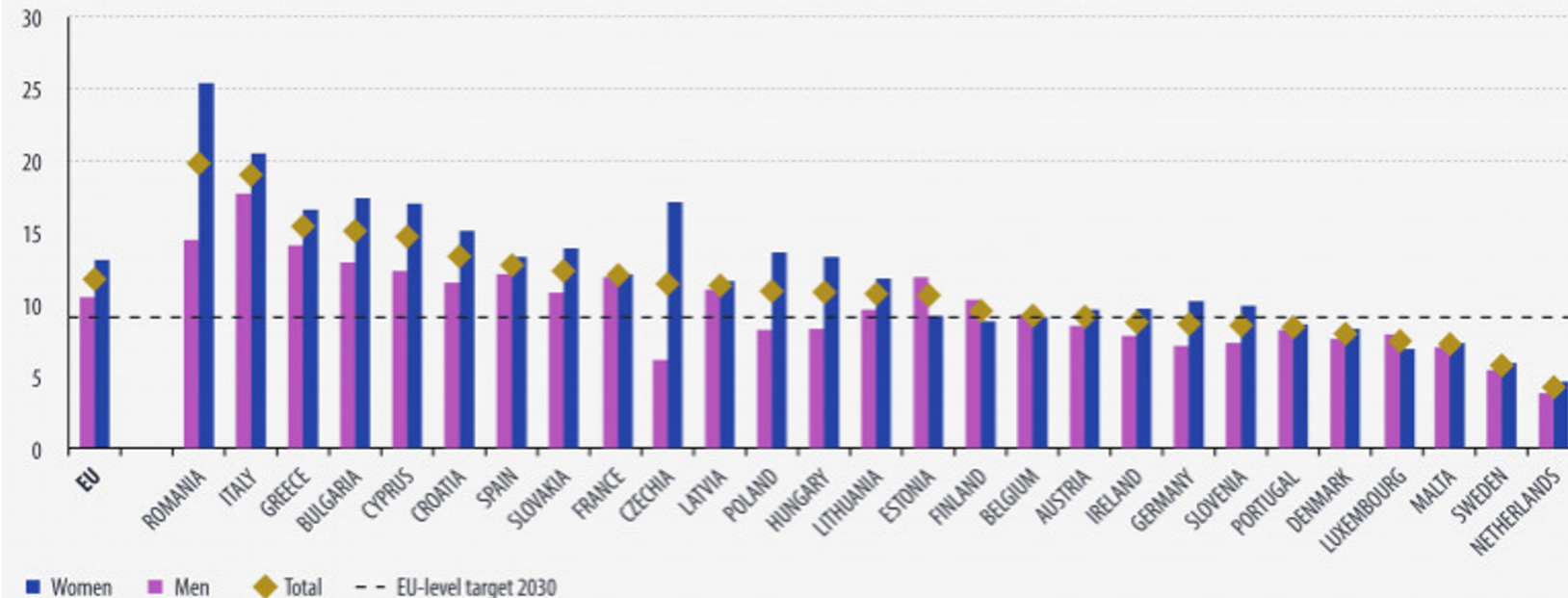


General situation of young people in Romania:

- Romania's GDP is growing strongly, a quarter of young people under 25 do not have a job: **youth unemployment is at 22%**. The EU average is 14%.
- Data from the European statistics institute Eurostat shows that **19.8% of young people aged 15 to 29 in Romania were not in education or training (NEETs)** in 2022 .
- There are differences in the proportion of NEETs between young women and men in the EU. Last year, **13.1% of young women aged 15 to 29 in the EU were NEETs**, while among **young men, the proportion was 10.5%**. In Romania it was (25.4%).
- The rate of unemployment among young people and the rate of NEETs are much higher in rural areas, **23.1% as against 11.1% for young people living in urban area**
- Unemployment affected to a greater extent low and medium level of education graduates, for which the unemployment rate was 14.2%, respectively 5.2%. For persons with higher education, the unemployment rate was 1.7%.

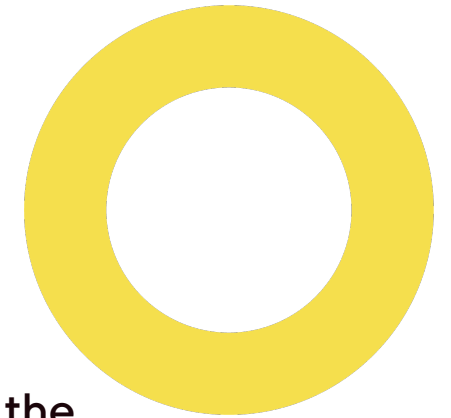
Young people (aged 15-29) neither in employment nor in education and training, 2022

(by sex, in %)



Note: ranked on the average share for men and women (aged 15-29).

Young people and their career choice behaviour 2/2



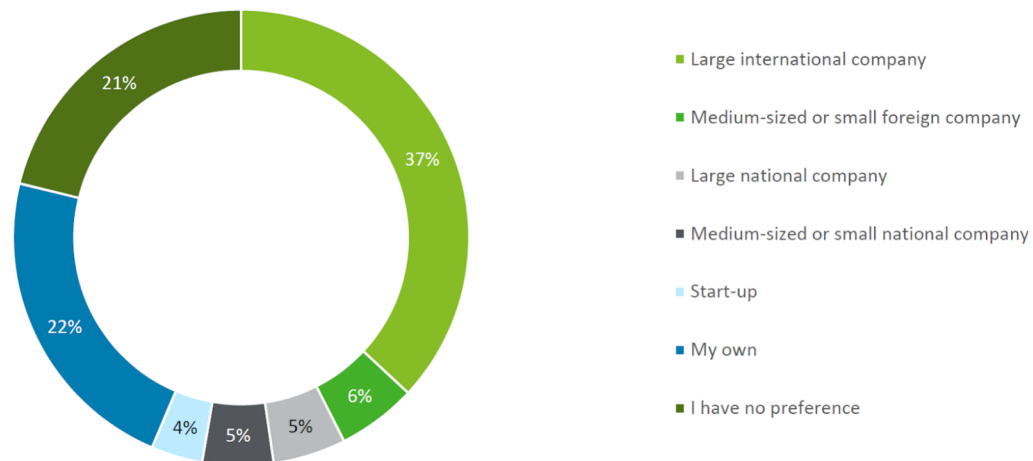
• Trends in career/orientation choices

- There is a preference for large international companies as employer and after the pandemic for state jobs.
- There is a high demand in internships opportunities that help develop specific works skills.

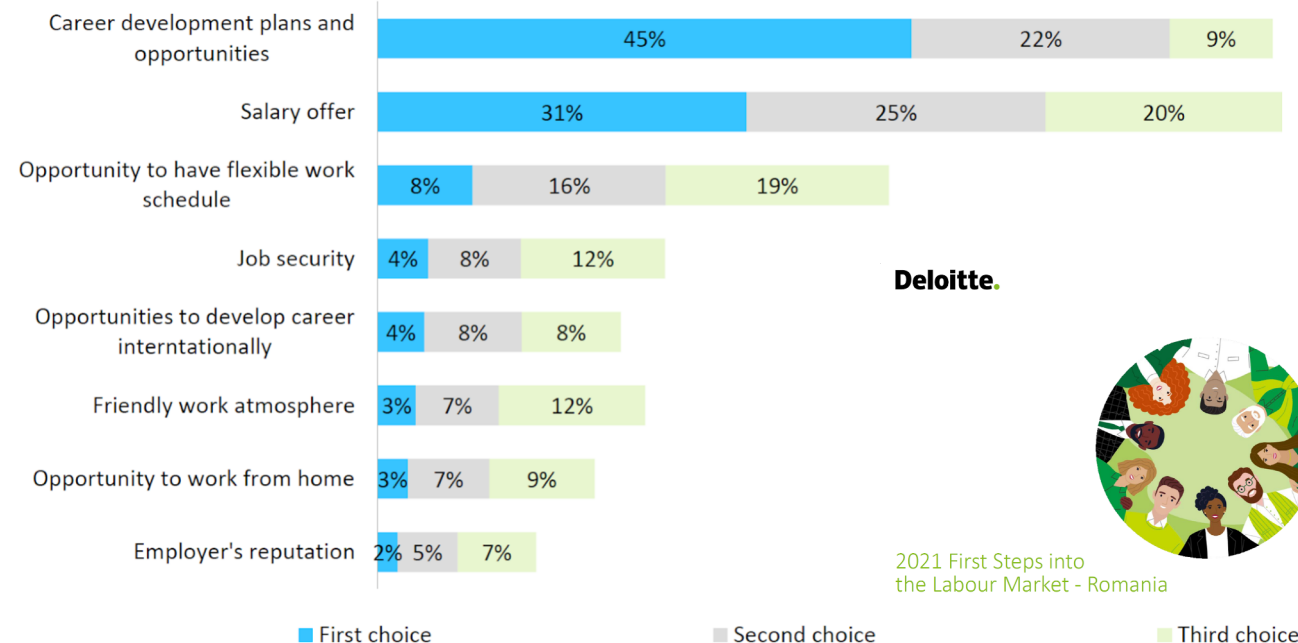
The TOP 5 domains with the most applications from young people are:

- IT&C • Procurement • Digital Marketing
- Recruitment • Administrative Secretariat

Preferred company types



Important factors when choosing an employer



Deloitte.

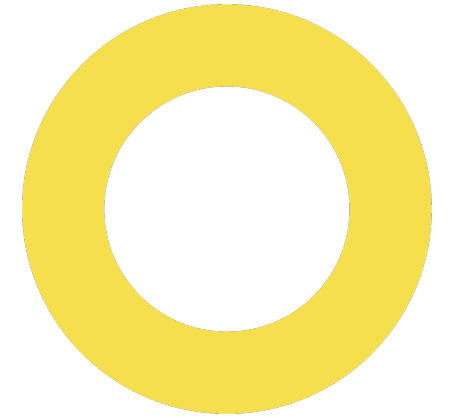


2021 First Steps into the Labour Market - Romania



Good practices of vocational orientation

Good practices of vocational orientation 1/2



A school like a company

Kronstadt German Vocational School

One of the most notable achievements of the national education system is the establishment, in Braşov, of the Kronstadt German Vocational School, an institution that is becoming, day by day, a landmark for what the process of relaunching professional and technical education means.

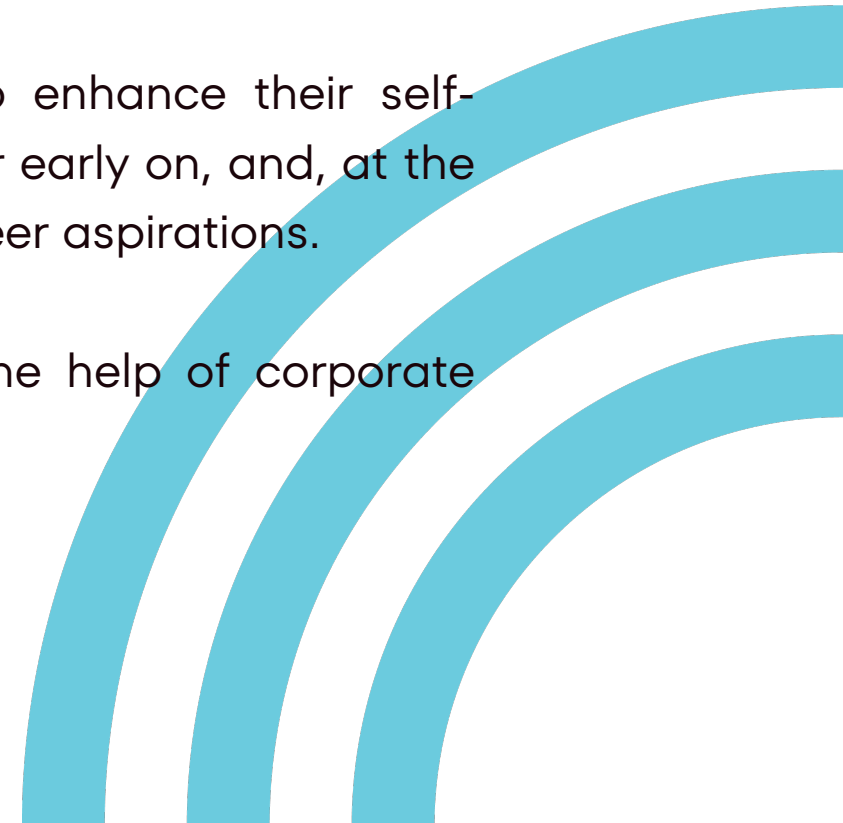
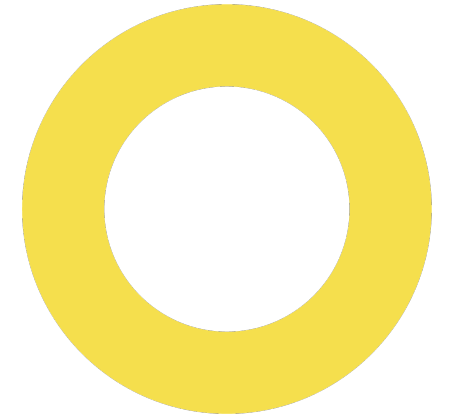
The member companies of the German Economic Club, together with the Braşov City Hall and the Braşov School Inspectorate, started in 2012 discussions with the aim of creating a school that would function with the German dual system as a model. In 2023 the school is fully functional and it is a national good case practice that will be replicated in other counties.

Good practices of vocational orientation 2/2

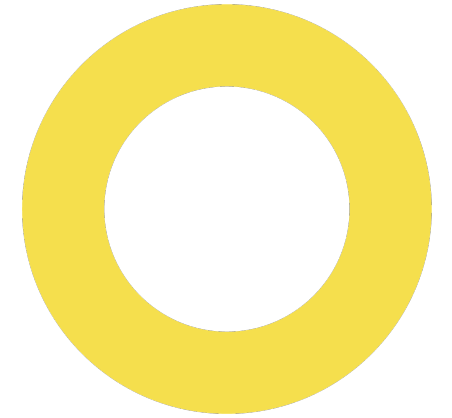
Career Bus by Scoala de Valori

This program provides young people with the opportunity to enhance their self-awareness, discover vocational alternatives they might consider early on, and, at the same time, assess their level of satisfaction with their future career aspirations.

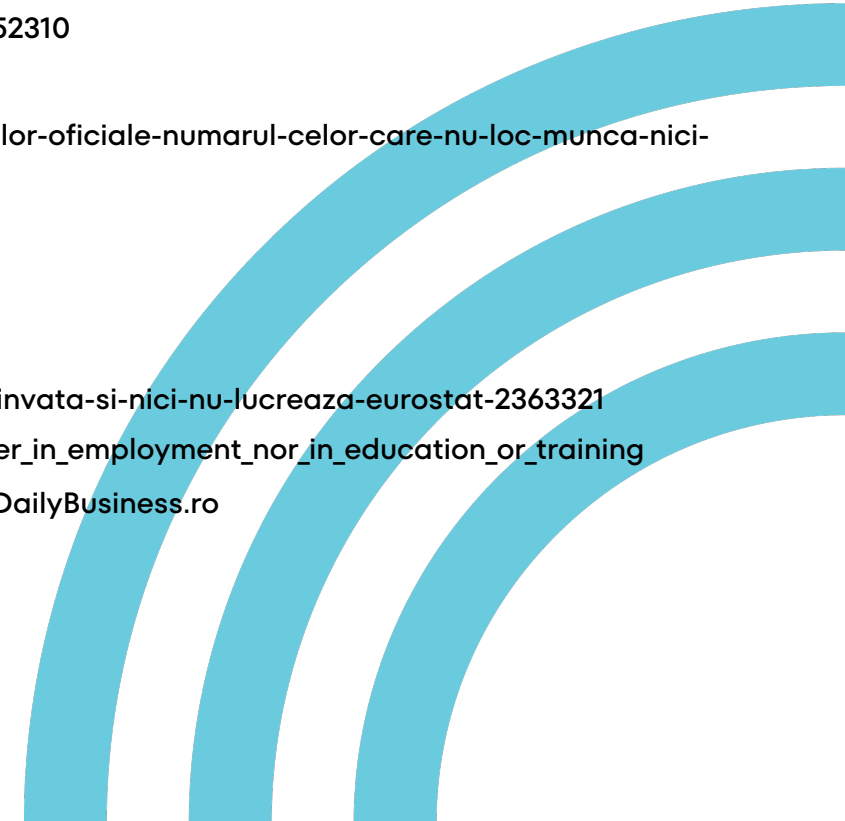
The program has been implemented at national level, with the help of corporate partners and institutional partners such as UNICEF.



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- Slide 7 - <https://www.digi24.ro/stiri/actualitate/social/romania-campioana-ue-la-numarul-de-tineri-care-nu-invata-si-nici-nu-lucraza-eurostat-2363321>
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- Slide 8-Generația Z pe Piața Muncii în 2023. TOP 5 domenii de activitate cele mai căutate de tineri în 2023 -DailyBusiness.ro
- Slide 10-<https://stiripentru copii.com/2021/07/10/scoala-profesionala-solutia-catre-meseriasii-viitorului/>
- Slide 11 - <https://scoaladevalori.ro>





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