CHANGING THE SKILLS NEEDS
FIRST FINDINGS FOR NORTH MACEDONIA

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SUMMARY OF THE PRESENTATION

• The ESJS in a nutshell. What’s in for the ETF partner countries?

• The post-pandemic (digital) transformation at the workplace

• Skill gaps and the learning potential

• Going digital: fear or facts?

• Few takeaways for future reflection
35 COUNTRIES SURVEYED BY 2023

Some 50,000 adult employees aged 25-64 surveyed
(sample size 1000 - 3000/country)

Job-skill requirements (skills demand approach), skills mismatch (vertical, gaps, horizontal), digitalisation, workplace learning in one highly versatile statistical tool relevant (EU Skills Agenda, EU Digital Strategy, European Education Area)

Conducted in two rounds (6 countries 2022/23 & 3 countries* 2024/25)

*Subject to discussion and confirmation of ETF’s Single Programming Document (SPD)
European skills & jobs survey

WHEN? / WHERE?

Pilot fieldwork: July 2022

Main fieldwork: Nov 2022

Unweighted data: End 2022

Dataset: Spring 2023

Products: Summer 2023

Dissemination: 2nd half 2023

ALBANIA
BOSNIA AND HERZEGOVINA
ISRAEL
KOSOVO*
NORTH MACEDONIA
SERBIA

KOSOVO*
WHAT DO WE WANT TO FIND OUT? ETF PCs vs EU

Workers holding higher qualifications than needed

Jobs requiring manual skills...

... or computerized machines

Jobs with low/high digital needs...

... or workers writing code at workplace

The pandemic: its impact on workers...

... and those working now remotely
<table>
<thead>
<tr>
<th>Cognitive</th>
<th>Manual</th>
<th>Interpersonal</th>
<th>Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading</td>
<td>Lifting</td>
<td>Counselling</td>
<td>Email / Internet / Social media</td>
</tr>
<tr>
<td>Writing</td>
<td>Dexterity</td>
<td>Selling</td>
<td>Word processing</td>
</tr>
<tr>
<td>Maths</td>
<td>Repetitiveness / standardisation</td>
<td>Serving</td>
<td>Spreadsheets</td>
</tr>
<tr>
<td>Problem-solving</td>
<td>Use of computerised machines</td>
<td>Presenting</td>
<td>Data management</td>
</tr>
<tr>
<td>Creativity</td>
<td></td>
<td>Teaching/training</td>
<td>Occupation-specific software</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Persuading / negotiating</td>
<td>Programming (AI)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Caring</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Team-working</td>
<td></td>
</tr>
</tbody>
</table>

In your main job, did you do any of the following during the last month?

- ...read texts that are at least >=5 pages long?
- ...lift or carry heavy loads, without the help of machines?
- Did you use any computer device to do the following activities for your work in the last month?
  - ...send emails?...
  - ...write or edit text using a word processor?
  - ...write a program or code using a computer language
New working patterns

What post-pandemic effects?

Main effects observed: an uptake of digital/remote working, bringing out a persistent digital transformation but also accentuating labour market inequalities.

In the last year, did you do any work as part of your main job from a location other than your employer’s premises?

- 25% EDU-high
- 25% EDU-low
- 23% Skilled occupations
- 21% Elementary occupations
- 43% Computer programmers
- 38% Financial/Insurance
- 8% Education
- 7% Health/Care

Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022), ETF provisional data
In the last year did *new digital technologies* have been introduced at your workplace? 

Has digital upskilling brought a substantial change on the jobs and likely triggering up/re-skilling?

*For example, new computer systems/devices or programmes, but not minor updates*

Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022), ETF provisional data
How digitalised are the jobs today in N. Macedonia?

Did you use computing devices to do the following activities as part of your main job in the last month?

Did you work with/operate any of the computerised machinery below in the last month at your main job?

**Source:** Cedefop-ETF, European Skills and Jobs Survey (2021/2022), ETF provisional data
14% of NMK employees held jobs requiring lower levels of their formal qualifications (diplomas).

What workers for today’s jobs?

What is the level of education usually needed to do a job like your main job nowadays?

<table>
<thead>
<tr>
<th>Field of Study</th>
<th>Overqualified</th>
<th>Underqualified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Israel</td>
<td>37%</td>
<td>8%</td>
</tr>
<tr>
<td>Serbia</td>
<td>37%</td>
<td>2%</td>
</tr>
<tr>
<td>Albania</td>
<td>27%</td>
<td>12%</td>
</tr>
<tr>
<td>Kosovo</td>
<td>26%</td>
<td>10%</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>North Macedonia</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>European Union</td>
<td>28%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Field of study for my job (today’s requirements)

- 30% Exclusively my field of study
- 27% A related field of study
- 9% A different field of study
- 34% Not a specific field of study

Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022), ETF provisional data
Skill gaps and the learning potential

To what extent do you need to further develop your overall level of knowledge/skills to do your job better?

40% of adult employees with high* unmet learning needs

*Sum of those reporting greatly & moderately unmet learning needs

Note: Totals may not add up to 100 due to those with an unknown/unidentifiable status/no response

Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022), ETF provisional data
New working realities... yet diverse awareness

4 in 5 employees holding *elementary jobs* lack awareness of the *new realities* in the world of work in North Macedonia.

To what extent do you need to further develop your *computer/IT skills* to do your main job even better?

*Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022). Author’s elaboration*
Investing in skills

Still sizeable disparities

In the last 12 months, have you participated in any education/training to learn new job-related skills?

And was at least one of these trainings done to further develop your computer/IT skills needed for your job?

ANY EDUCATION/TRAINING ACTIVITY

TRAINING TO DEVELOP DIGITAL SKILLS

Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022). Author’s elaboration
Learning potential in digital skills remain vast despite modest digital skill demand

Cedefop Digital Skills Intensity index (EU+ countries)

<table>
<thead>
<tr>
<th>Level</th>
<th>Percentage</th>
<th>Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-users</td>
<td>13%</td>
<td>Internet browsing, email, social media, Write or edit text, Use spreadsheets</td>
</tr>
<tr>
<td>Low</td>
<td>28%</td>
<td>Use specialised software, Prepare presentations, Use advanced spreadsheets</td>
</tr>
<tr>
<td>Medium</td>
<td>43%</td>
<td>Manage or merge databases, IT systems, hard/software, Programme or code</td>
</tr>
<tr>
<td>High</td>
<td>16%</td>
<td>Low and medium skills are for individuals with low or medium digital skills. High skills are for individuals with high digital skills.</td>
</tr>
</tbody>
</table>
27% of employees reported a high/moderate job insecurity, for 35% it's linked to lack of digital skills. Job insecurity is non-uniform by type of digital technologies used. Do you think you may lose your current job as new digital/computer technologies will do your work?... and as new digital/computer technologies will also need new skills/knowledge which you don’t currently hold?

Source: Cedefop-ETF, European Skills and Jobs Survey (2021/2022), ETF provisional data.
Digitalisation is also seen as an innovator, no longer as a disruptor

So far, digitalisation = job destruction potential; indeed, it could expectedly lead to job losses, it could also automate some job-tasks of an occupation but not entire jobs/occupations

ESJS data/evidence is a major shift in thinking, making way for a more balanced perspective

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**Few takeaways for future reflection**

**Digitalisation could indeed increase job insecurity**

Particularly in manual/routine occupations, less in non-routine jobs

1/4 EU employees think that technology can/will (partly) do their tasks

**Today’s (low skill demand) jobs could foster skills underutilisation**

With workers using basic digital technologies/if at all => a 1st step towards their jobs tasks being displaced by digital technology => the next one: digital transition could become a pathway for less rewarding jobs

**(Despite) widespread skill gaps and yet low training engagement**

High inequalities in training intensity/participation, those who need it most often don’t get it

Digital upskilling entailed to learn using the ‘basics’, is modest and its duration not substantial

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