

EXPANDING EVIDENCE ON SKILLS SUPPLY AND DEMAND



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WORKSHOP'S FLOW

I. Key sources of evidence to inform education, training and employment policies

II. Recent developments for tracking graduates' transition to work

- policy recommendations, experiences of EU MS and ETF partner countries
- Montenegro case

III. Identification of current and future skills demand

- policy recommendations, experiences of EU MS and ETF partner countries
- Montenegro case

IV. Linking labour supply with demand: illustrative cases of skills matching – Italy and Portugal

V. Working together for improving the relevance of skills development – milestones of Montenegro-ETF cooperation in 2018



Main skills-related labour market information tools

Main skills-related LMI Tools

Employers surveys

- At national, local and sectoral level
- Different methods (electronic or face to face)
- Mainly address the short-term skills/staff needs

Sector studies

- Combination of quantitative and qualitative methods
- Focused on economic sectors
- Heavily rely on social partners involvement
- Supports strategic sectors dev

Tracer studies

- At national or institution level
- Provide feedback for curriculum development, link education and work, inform potential students, career guidance
- Not prioritised/regular

Quantitative projections

- Longer term horizons
- Formal, national level, quantitative, model-based forecasts
- Requires reliable long data series

Foresight

- Expert panels, Delphi forecasting, scenarios
- Including formal quantitative projections
- To identify main drivers of change, scenarios for plausible evolution, strategic choices

Qualitative studies

- Can bring more understanding of the underlying causes and processes
- Can facilitate the engagement of the actors
- May provide partial/biased views



Challenges to data generation and use

- 🕒 **TIME LAG FINDINGS / INCORPORATION INTO POLICIES**
- 🗑️ **INFORMATION AND DATA AVAILABLE BUT UNDER-UTILIZED OR NOT USED**
- 🔄 **AD HOC SURVEYS – NOT EMBEDDED IN THE SYSTEM**
- 💡 **WEAK RESPONSIVENESS OF E&T SYSTEMS**
- 🌿 **INTERMEDIARY INSTITUTIONS (E.G. PES, OBSERVATORIES, ETC.) UNDERDEVELOPED OR UNDER-UTILIZED**
- 🤝 **PARTNERSHIP TO BE ENHANCED**
- 🌸 **RESEARCH CAPACITY TO BE DEVELOPED**
- 👥 **PROMOTING AND COMMUNICATING CLEARLY THE RESULTS TO WIDE AUDIENCE**



Source: ETF cross-country analysis on skills needs identification and skills matching in South Eastern Europe

[http://www.etf.europa.eu/webatt.nsf/0/52a4b230df6113f1c125805a005567b3/\\$file/skills%20needs%20identification%20and%20matching%20see.pdf](http://www.etf.europa.eu/webatt.nsf/0/52a4b230df6113f1c125805a005567b3/$file/skills%20needs%20identification%20and%20matching%20see.pdf)





TRACKING GRADUATES

Policy recommendations and country cases



EU POLICY RECOMMENDATIONS (1)

COM(2017) 249 FINAL COUNCIL RECOMMENDATION ON TRACKING GRADUATES

WHAT: IMPROVE THE AVAILABILITY OF QUALITATIVE AND QUANTITATIVE INFORMATION ABOUT GRADUATES (**TERTIARY AND VET**) AND THEIR LABOUR MARKET INSERTION

WHY: TO BETTER UNDERSTAND THE CAUSES OF GRADUATE EMPLOYABILITY CHALLENGES AND SUCCESS FACTORS; HAVE BETTER EVIDENCE FOR DECISION MAKING; MORE COMPARABLE DATA ACROSS EUROPE; LINKED TO EQAVET INDICATOR (PLACEMENT RATE IN VET PROGRAMMES)

HOW:

- STIMULATE FURTHER DEVELOPMENT AND IMPROVEMENT OF GRADUATE TRACKING SYSTEMS AT NATIONAL LEVEL
- COOPERATION AND SHARING OF GOOD PRACTICES
- IMPROVE AVAILABILITY OF COMPARABLE INFORMATION (E.G. EUROPEAN GRADUATE SURVEY – PILOT TO TEST FEASIBILITY, FOCUS ON TERTIARY GRADUATES)



EU POLICY RECOMMENDATIONS (2)

EU Member States are recommended **to establish by 2020 graduate tracking systems** that include:

- collection of relevant administrative data from education, tax and social security databases
- development of longitudinal graduate surveys
- link, on anonymised basis, data from different sources

As LM transitions are very much influenced by socio-demographic factors and economic family background (plus economic context, qualifications and field of study), tracking systems should gather such information. Challenge: graduates who migrated.

EU MS to report annually to Commission implementation steps (to start in 2019).

A network of experts to be established (similar to ET2020 working groups)



TRACKING GRADUATES IN ESTONIA*

EDUCATION INFORMATION SYSTEM OF ESTONIA (EHIS)

EHIS - state register which is run by automated data processing and the data are stored digitally

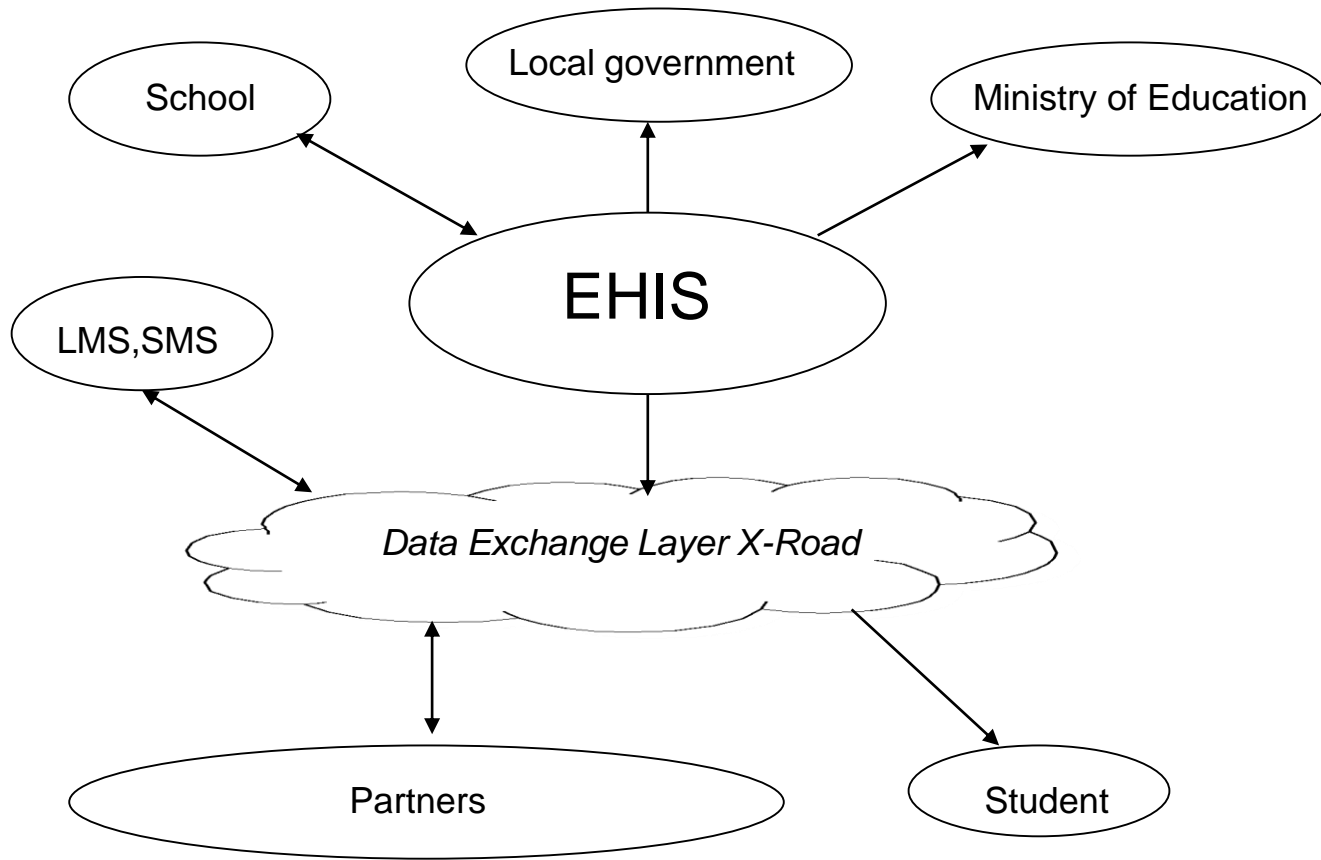
Ministry of Education and Research collects education-related data from schools, including vet institutions

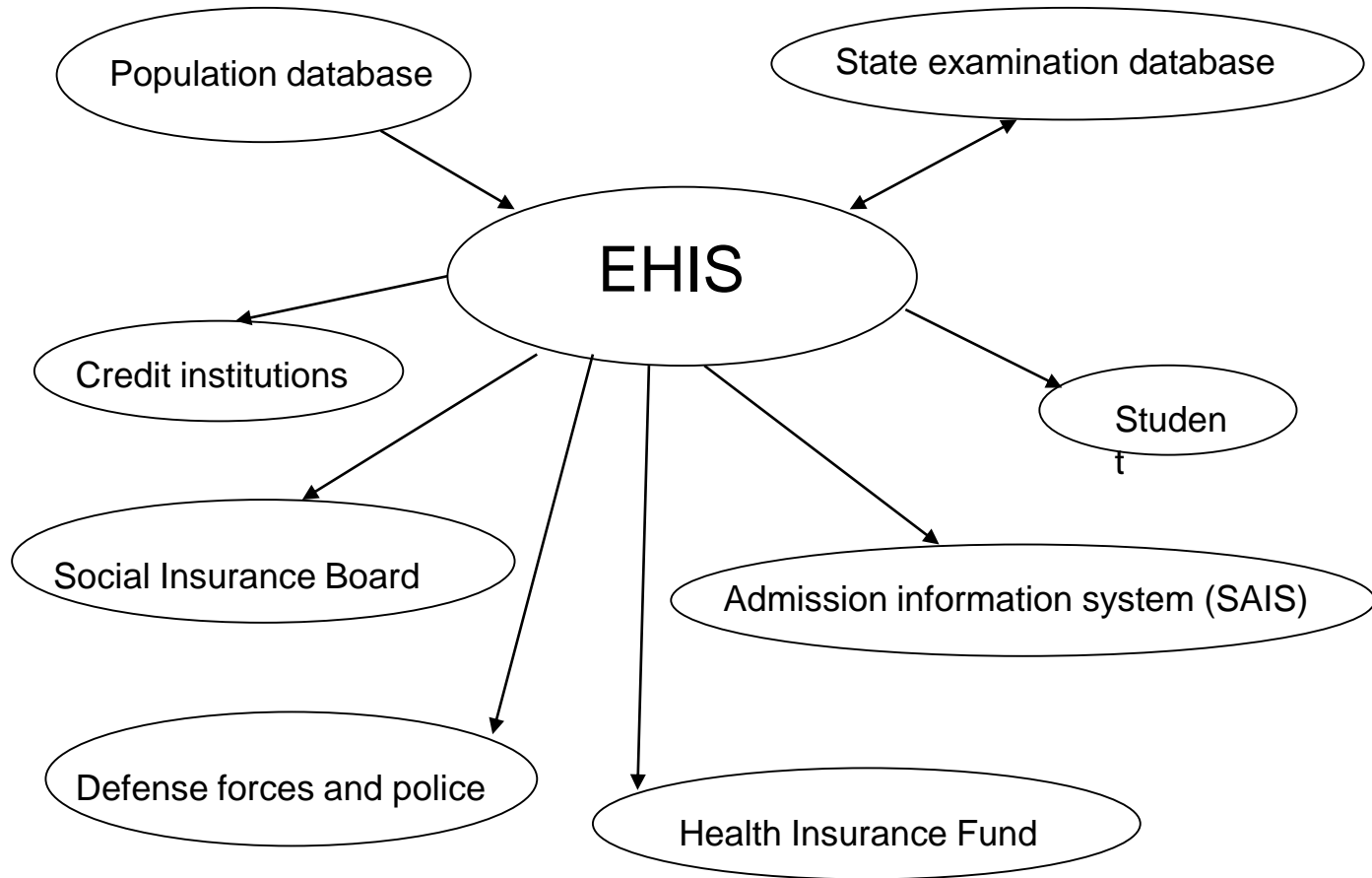
EHIS is run as automated data processing; data are stored digitally (since 2005). All data about education in one information system; connected to other databases

All schools give input and the ministry publishes a selection of education statistics on the web page haridussilm (education eye) - <http://www.haridussilm.ee>

*Based on Kaie Piiskop's contribution (Foundation Innove Estonia) to ETF event in May 2017 on tracer studies)







TRACKING GRADUATES IN ESTONIA

SCHOOLS COLLECT INFORMATION FROM STUDENTS. RESULTS ARE BEING FORWARDED TO THE ESTONIAN MINISTRY OF EDUCATION AND RESEARCH (SATISFACTION SURVEYS)

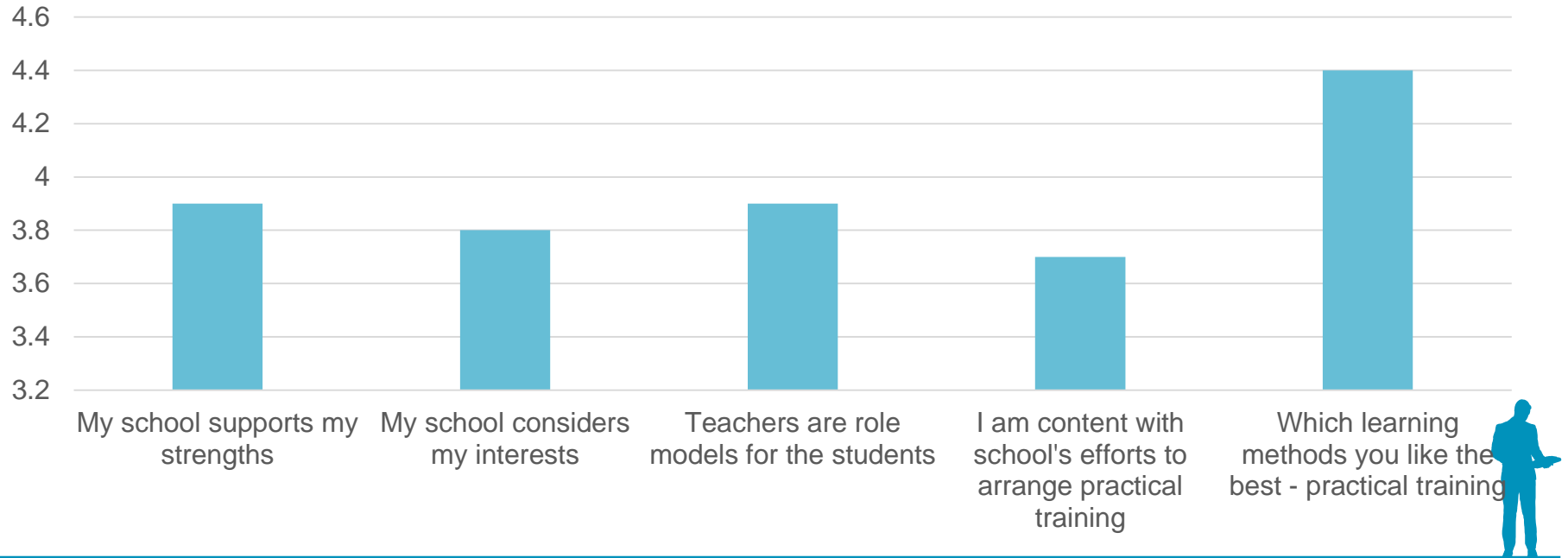
SCHOOLS COLLECT INFORMATION FROM ALUMNI WHO GRADUATED 3 YEARS AGO.

SURVEYS ARE BEING CONDUCTED ELECTRONICALLY AND COLLECTED INFORMATION IS BEING USED:

- IN ACCREDITATION REPORTS,**
- TO ORGANISE THE LEARNING PROCESS MORE EFFECTIVELY AND**
- TO DEVELOP OR UPDATE CURRICULA**

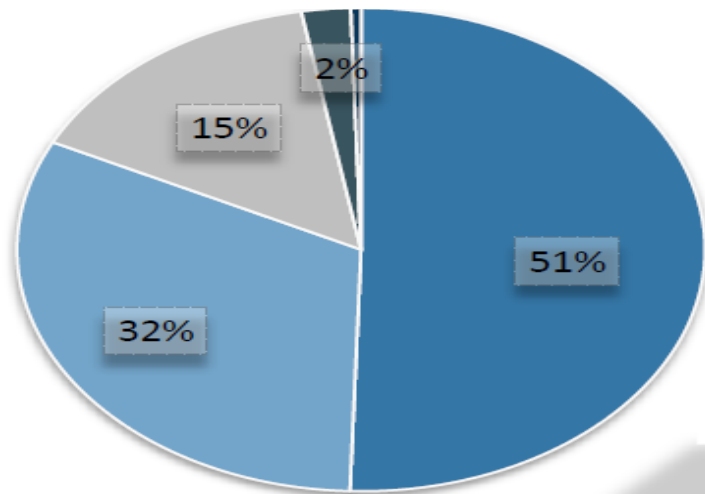


STUDENTS' FEEDBACK



Average grade on the scale; 1- disagree completely, 5 - agree completely

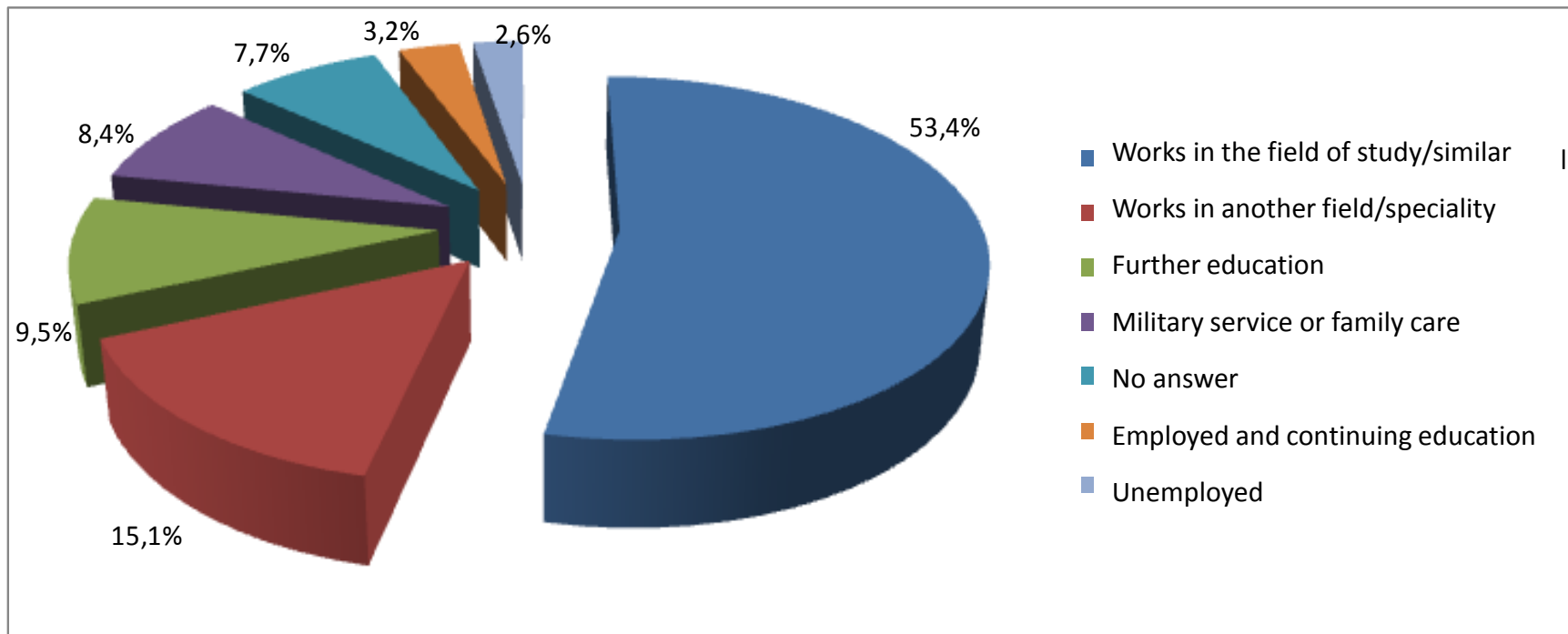
CONTENT WITH THE AQUIRED PROFESSION



- Very pleased
- Rather dissatisfied
- So and so
- Rather satisfied
- Not at all satisfied



LABOUR MARKET INSERTION OF GRADUATES



TRACKING GRADUATES IN THE ETF PARTNER COUNTRIES

- **UNEVEN SITUATION: MOST COUNTRIES DO NOT HAVE OR HAVE IRREGULAR PRACTICES OF TRACING (AD-HOC; DONOR SUPPORTED)**
- **AFFECTS UNDERSTANDING OF SKILLS, BEING IS BIASED TOWARDS EMPLOYERS' DEMAND (PERCEPTIONS AND EXPECTATIONS)**
- **ETF SUPPORTS/ED TRACER STUDY DEVELOPMENT IN KYRGYZSTAN, REPUBLIC OF MOLDOVA, KOSOVO, FORMER YUGOSLAV REPUBLIC OF MACEDONIA (IN COOP. WITH WORLD BANK). GIZ SUPPORTS ALBANIA**
- **ILO LED SCHOOL TO WORK TRANSITION SURVEYS IN A NUMBER OF COUNTRIES, INCL. MONTENEGRO**



KEY FINDINGS OF TS IN FYROM (2016)

VET and HE graduates are relatively satisfied with their learning experiences

Most complain about school teaching equipment (VET) and sport or leisure activities (HE)

Low satisfaction with the support services (for internship and/or employment) provided by the educational institutions

Many VET and HE graduates do not participate in any internships while studying

Graduates assessed their chances of influencing VET and HE institutional policies as relatively poor

VET graduates have more negative perceptions about their job, the use of skills they gained in the education system and the extent of the mismatch



CURRENT AND FUTURE SKILLS NEEDS' IDENTIFICATION

Policy recommendations and country cases



EU APPROACH TO SKILLS IDENTIFICATION

Long standing research and data exchange on skills and occupational trends and forecasting

A New Skills Agenda for Europe (2016) calls for improving skills intelligence:

- **Blueprint for sectoral cooperation on skills** (new framework for strategic cooperation between key stakeholders, to, among others, translate sectoral strategies for the next 5-10 years into identification of skills needs and development of concrete solutions)
- **Skills Panorama (Cedefop) to integrate in Europass service** (aim: bringing together accurate and real-time information via web crawling, big data analysis, and evidence from different sectors)



GEORGIA: INTEGRATED LABOUR MARKET INFORMATION SYSTEM

- on the way to establish an integrated labour market information system (EU project support);
- **LMIS IT – one stop shop portal with information on labour market conditions and trends, career guidance information, occupational profiles (user friendly interface in Georgian and English)**
- **Targets decision makers, business, jobseekers, learners/students;**
- **Will support decision making on career, educational and employment of individuals;**
- **Comprehensive sources of data and processing that feeds into education and labour policy analysis**
- **Interagency Coordination Council established for coherent functioning and timely information flow (State institutions, social partners, civil society)**

(Based on a contribution the George Gamkrelidze, Acting Head of Labour Market Analysis Division, Ministry of Labour, Health and Social Affairs of Georgia to ETF's Learning Programme on Skills anticipation, October 2016)





LMIS Interface

Web design is in process...

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TURKEY: PES CONTRIBUTION TO SKILLS ANTICIPATION AND MATCHING

CORE FUNCTIONS

- LM SURVEYS & ANALYSIS
- ACTIVE LM PROGRAMMES

(vocational training; on the job training, measures for disadvantaged groups; public works)

- PASSIVE LM PROGRAMMES
- JOB & VOCATIONAL COUNSELLING
- JOB PLACEMENT SERVICES

DATA COMPILATION METHODS

SURVEY DATA - LM demand survey

– identify short term labour demand at local level (current employment, vacancies, diff. to fill occupations, empl. trends) and supports ALMMs planning;

- annual; representative; face to face & internet based

ADMINISTRATIVE DATA

- employment services, unemployment insurance, ALMPs, job and vocational counselling

(based on the contribution of Eser Erol, Employment Expert, Turkey Public Employment Service – ISKUR, to ETF's leaning Programme on Skills Anticipation, October 2016)



LABOUR MARKET DEMAND SURVEY AND ANALYSIS IN TURKEY (ISKUR)

INSTRUMENT

done since 2006, twice a year since 2012
90,000 local economic units visited in 2016
coverage: private local units having 2-9 and 10+ employee
exhaustive (75 provinces) and sampling (6 provinces) of 10+ units; sampling of 2-9 units

TOPICS:

- Basic information about workplace,
- Current employment (sex and occupation breakdown)
- Job vacancy (occupation, demanded levels of education and skills, ways of providing the demands)
- Occupations difficult to fill (occupation and reason for difficulty to fill).



FINDINGS (2016)

- HIGHEST VACANCY IN MANUFACTURING AND TRADE SECTORS
- JOB SEARCH STRATEGY: VIA RELATIVES (1ST PLACE) AND ISKUR (2ND)
- ONE IN EVERY 5 EMPLOYER HAS EXPERIENCED DIFFICULTIES IN FINDING AND HIRING SUITABLE EMPLOYEE
- MOST DIFFICULT OCCUPATIONS TO BE FILLED ARE SALES CONSULTANT, SEWING (MECHANIC), WAITER, SALES REPRESENTATIVE, MANUAL WORKER, GAS METAL ARC WELDER AND DRIVER (TRANSPORT SECTOR)
- REPORTING DONE WITHIN EACH PROVINCE AND NATION WIDE; FINDINGS INFORM EMPLOYMENT AND TRAINING (VET) PLANNING



THANK YOU FOR YOUR ATTENTION

FURTHER INFORMATION AT

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