



Comprehensive sectoral analysis of emerging competences & economic activities in the European Union

European Gas Industry Social Dialogue Committee

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European Commission, DG Employment, social affairs and equal opportunities

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Background



Unit EMPL/F/3:

Adaptation to change and working conditions

Anticipation → **Preparation** → **Management**

*Develop and stimulate
anticipative actions*

Exchange good practices

*Assist restructuring
processes
(anticipation, preparation,
management)*



Project history



Comprehensive sectoral analysis of emerging competences & economic activities in the European Union

- End of 2006 Contract on Methodological aspects
- March 2007 Draft report on Methodological aspects
- Mid 2007 Pilot project « automotive industry »
- Aug 2007 Open Call of tender 17 sectors studies
- Jan 2008 Kick-off meeting sectoral studies
- March 2008 Experts' panel workshop « automotive industry »



Sectors covered by studies



<i>Lot</i>	<i>Description</i>	<i>NACE Rev.2</i>	<i>NACE Rev.1.1</i>	<i>Awarded to</i>
<i>1</i>	<i>Non-energy extractive industries</i>	<i>7-8-9.9</i>	<i>13-14</i>	<i>Lot not awarded – no bid submitted</i>
<i>2</i>	Textiles, wearing apparel and leather products	<i>13-14-15</i>	<i>17-18-19</i>	<i>Economix</i>
<i>3</i>	Printing and publishing	<i>18-58</i>	<i>22</i>	<i>TNO</i>
<i>4</i>	Chemicals, pharmaceuticals, rubber and plastic products	<i>20-21-22</i>	<i>24-25</i>	<i>TNO</i>
<i>5</i>	Non-metallic materials (glass, cement, ceramic,...)	<i>23</i>	<i>26</i>	<i>TNO</i>
<i>6</i>	Electromechanical engineering	<i>27-28</i>	<i>29-31</i>	<i>Alphametrics</i>
<i>7</i>	Computer, electronic and optical products	<i>26</i>	<i>30-32-33</i>	<i>TNO</i>
<i>8</i>	Building of ships and boats	<i>30.1</i>	<i>35.1</i>	<i>IKEI</i>
<i>9</i>	Furniture and others	<i>31-32-33</i>	<i>36</i>	<i>TNO</i>
<i>10</i>	Electricity, gas, water & waste	<i>35-36-37-38-39</i>	<i>40-41</i>	<i>TNO</i>
<i>11</i>	Distribution, trade	<i>45-46-47</i>	<i>50-51-52</i>	<i>TNO</i>
<i>12</i>	Tourism including hotels, catering and related services	<i>55-79.1</i>	<i>55-63.3</i>	<i>Oxford Research</i>
<i>13</i>	Transport	<i>49-50-51-52</i>	<i>60-61-62-63</i>	<i>TNO</i>
<i>14</i>	Post and telecommunications	<i>53-61</i>	<i>64</i>	<i>TNO</i>
<i>15</i>	Financial services (bank, insurance and others)	<i>64-65-66</i>	<i>65-66-67</i>	<i>Economix</i>
<i>16</i>	Health and social work	<i>86-87-88-75</i>	<i>85</i>	<i>TNO</i>
<i>17</i>	Other services, maintenance and cleaning	<i>94-95-96-97-98</i>	<i>90-91-93-95</i>	<i>TNO</i>



Project objective and stages



- **Objective**

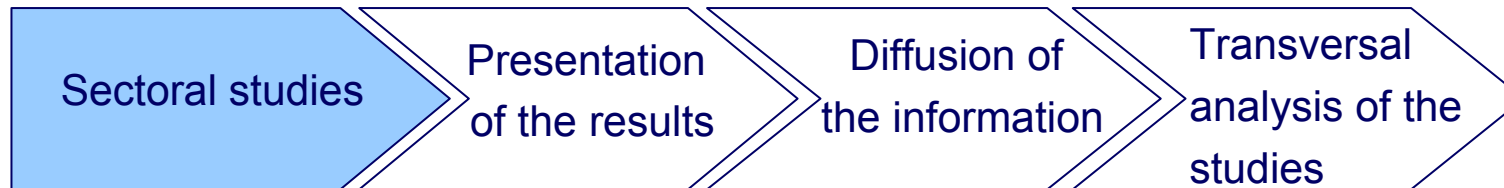
- Develop a European foresight methodology to identify emergent jobs and their skills needs

Economy ↔ Training/Education

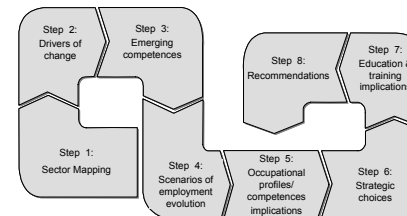
- **4 Stages**



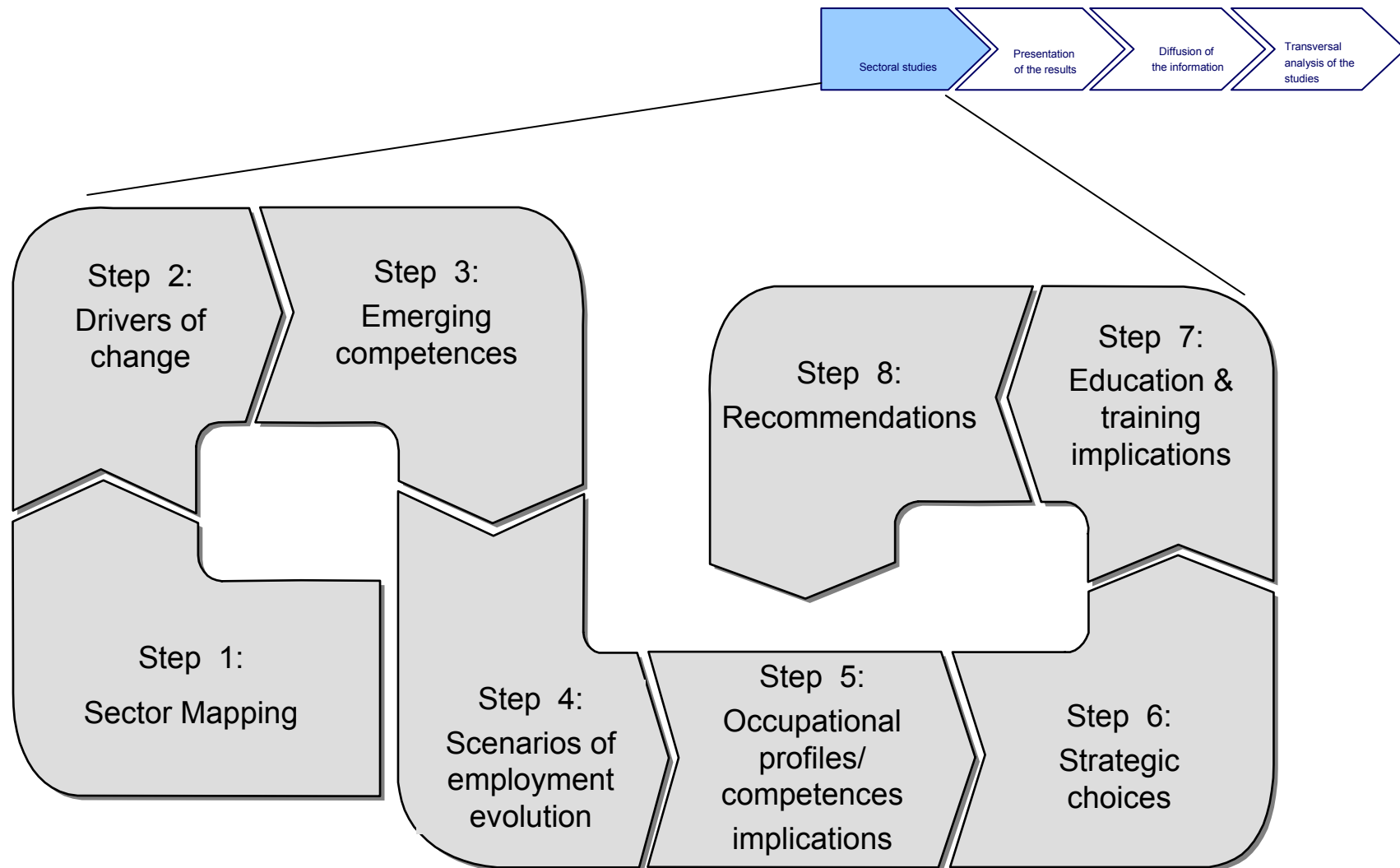
Stage 1: Sectoral studies



- Aim of these studies:
 - Make a state of players of the sector
 - Identify the main drivers of change
 - Present the main scenarios of possible outcomes
 - Identify implications for skills needs
 - Make recommendations
- Proposed methodology applied for performing the studies
 - Methodology divided into 8 steps



Stage 1 – Sectoral studies methodology



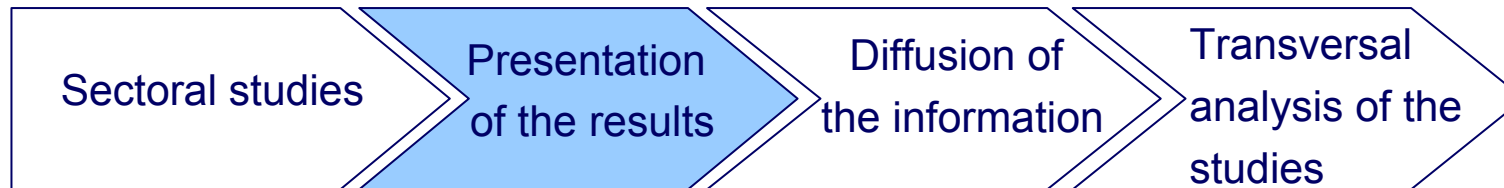
Stage 1 – Building on existing expertise



- Collaboration with social partners, other Commission services (Entr, Markt, EAC, Tren), Cedefop, EMCC, EESC, CoR, EP
- Participate in Steering Committee of sector concerned
- Provide contractor with information on the sector (advice, studies, contact persons, experts)



Stage 2: Presentation of the Results



- Studies to be discussed and approved by expert group in sector selected
- Expert workshop for each sector according to following timetable:

With support of EMCC



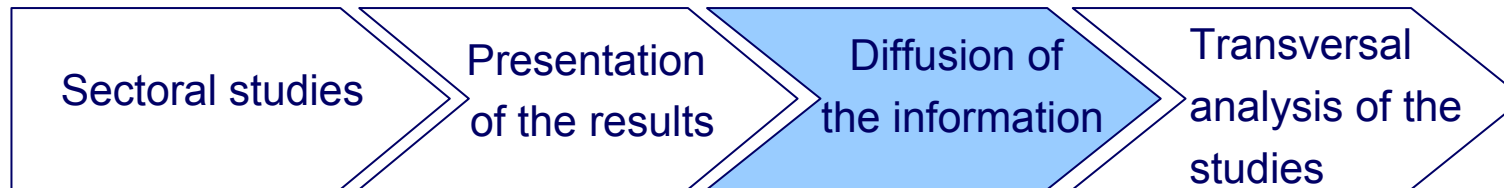
Timetable – Experts' workshops



Textiles, wearing apparel and leather products	October 2008
Printing and publishing	October 2008
Chemicals, pharmaceuticals, rubber and plastic products	October 2008
Non-metallic materials (glass, cement, ceramic,...)	November 2008
Electromechanical engineering	November 2008
Computer, electronic and optical products	November 2008
Building of ships and boats	December 2008
Furniture and others	December 2008
Electricity, gas, water & waste	January 2009
Distribution, trade	January 2009
Tourism including hotels, catering and related services	January 2009
Transport	February 2009
Post and telecommunications	February 2009
Financial services (bank, insurance and others)	February 2009
Health and social work	March 2009
Other services, maintenance and cleaning	March 2009



Stage 3: Diffusion of the information

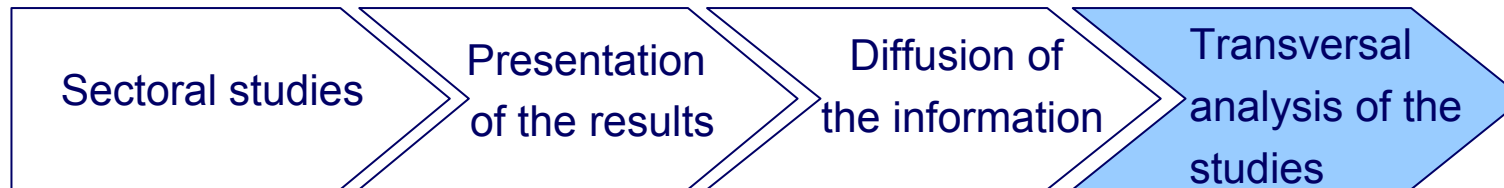


- Once approved, results of studies disseminated to all actors concerned:
 - Social partners
 - cross-industry and sector
 - Public authorities
 - national, regional and local
 - Industry
 - Academics

**ESSENTIAL ELEMENT OF THE PROJECT:
Launching anticipative approaches to be picked up by sectors,
regions, other possible stakeholders**



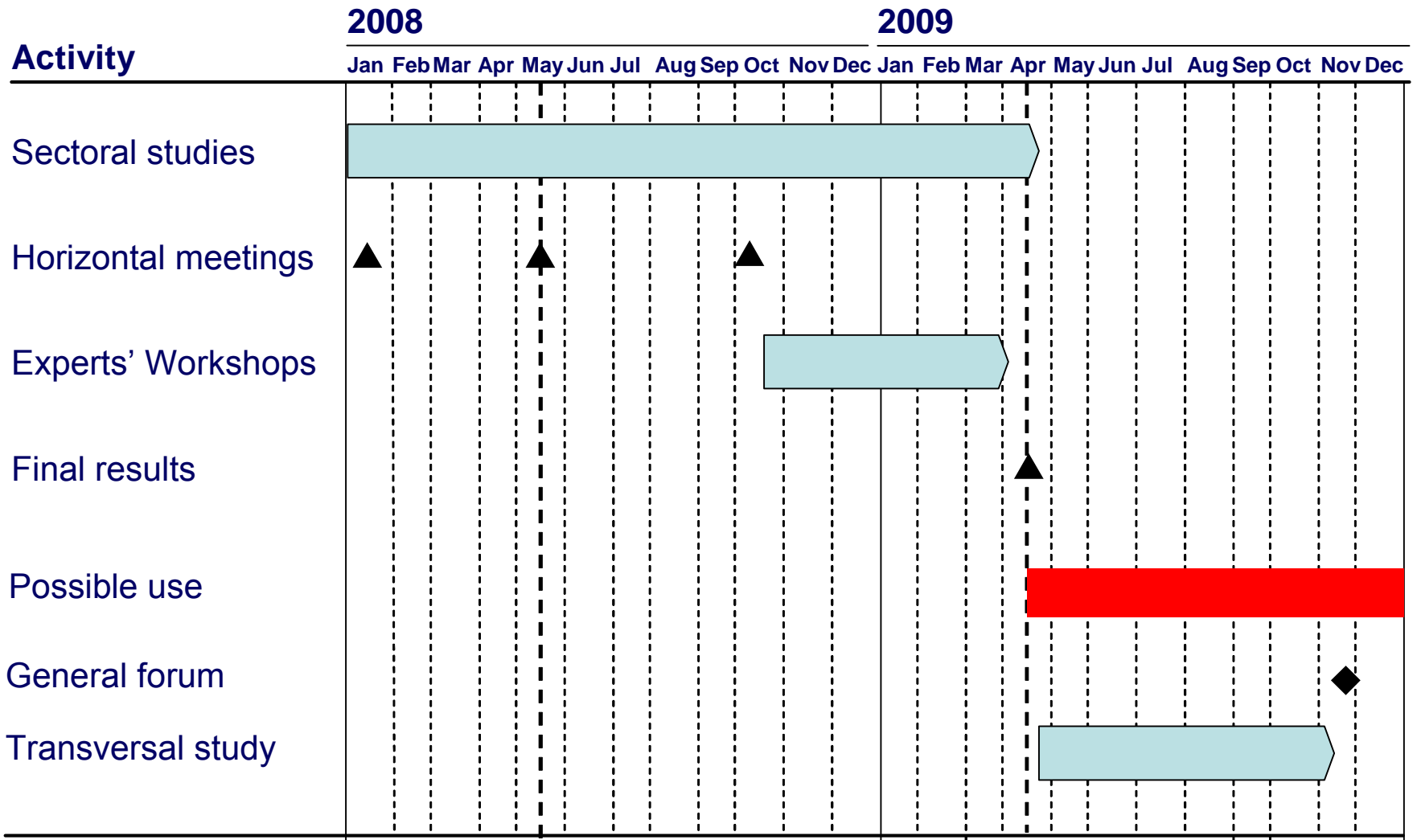
Stage 4: Transversal analysis



- Transversal study on potential transfer of occupational profiles between sectors
- Attempt to overcome the limitations linked to sectoral definitions - Supply and value chains -
- Call of tenders 2nd semester 2008



Project planning



Project outputs



1. New drivers for job renewal identified
2. Foresight instruments developed to analyse emerging activities in support of innovation, employment and regional policy
3. New job profiles disseminated in vocational guidance
4. Strategic planning in education and training systems improved
5. Development of partnerships for innovation, skills and jobs supported



Timetable Project



9 Jan	Kick-off: 1 st Multisectoral meeting
→ 31 Jan	1 st Sectoral meetings
15 May	2 nd Multisectoral Meeting
→ 31 May	2 nd Sectoral meetings - Final interim report
3 Oct	3 rd Multisectoral meeting
Oct – March 09	Sectoral experts' panel workshops
+ 1 month	Final report 1 month after the experts' panel workshop



ANTICIPEDIA project



Follow-up of the Restructuring Forum on anticipation (June 2007)

Interactive web-site

A place to find information concerning activities in links with anticipation

A place to exchange comments, information,....

2nd semester of 2008





Thank you for your attention

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http://ec.europa.eu/employment_social/restructuring/index_en.htm



Framing the Project



Connecting and building on other initiatives which are already underway, notably:

- the European Restructuring Forum (DG Employment)
- the monitoring of industrial sectors (DG Enterprise)
- the development of clusters of innovation and lead markets (DG Enterprise)
- the technology platforms (DG Research)
- the support to partnerships for innovation (DG Regional Development)
- the *Skillsnet* project (CEDEFOP)
- the European Monitoring Centre on Change (EMCC, Dublin)
- the European Qualifications Framework and the Euroskills Forum (DG Education)
- the monitoring of the national reform programmes for growth and jobs and the national frameworks for structural funds
- the recent “New Skills for New Jobs” Initiative



Mapping (step 3)



Analysis of historical trends in the aim to identify old and current drivers

Drivers = explanation of past and current trends

Main variables : employment & competences (main occupation functions)

Employment structure (gender, age, occupation, educational level)

Productivity

Labour costs

Work organisation (working hours, investments in human capital, Industrial relations,...)

Innovation (new materials, process, Just-in-time, technological changes, patent, R&D,...)

Strategies (outsourcing, offshoring, relocation, networks & clusters,...)

Output

Demand (consumer preferences, household income,...)

External trade (trade restrictions, market access, world market, intellectual property,..)

International competition (price, product,...)

Regulatory framework (taxation, WTO, environment, Eur,..)

Community supports (technological platform,..)

...

SWOT conclusions

Comparison with main partners (USA, Japan, BRICS,...)

Period: +/- 15 years (min 1995 LFS)

Sources: LFS, Eurostat, professional organisations, research findings,...



Minimum requirements for the reports:



Table of contents based of the different steps

Presentation of the tables defined in the methodology (it's a minimum)

Definition

List of pertinent sub-sectors or activities

Step 3.

For the sector and main pertinent sub-sectors

Employment trends in the EU, USA, Japan and others (notably in BRICS)

Output trends in the EU, USA, Japan and others (notably in BRICS)

Trade balance in the EU Member States

Knowledge intensity in the EU, USA, Japan and others (notably in BRICS)

Employment trends by educational level in the EU

Employment by occupation in the EU Member States in the EU

(Table 11 sub-sectors/main occupation functions)

Employment by form of work organisation in the EU Member States

Step 4.

Main drivers of change in sector and/or sub-sectors

(Table 7 main drivers/sub-sectors → possible changes by sub-sector)

Step 5.

Identifying new critical competences by occupational function in sector and/or sub-sectors

(Table 8 main drivers/main occupation functions → possible new competences by occupation)

Step 6.

Scenarios and implications for employment trends

(Table 9 sector and/or sub-sectors/scenarios → possible employment trends by scenario)

Step 7.

Impact for occupations of jobs in expansion, transformation or decline in each Scenario

(Table 10 for each scenario: sector and/or sub-sectors/employment trends → main occupation function)

Questions and Answers - Dissemination by E-mails of Q&A

